

**PCC+**

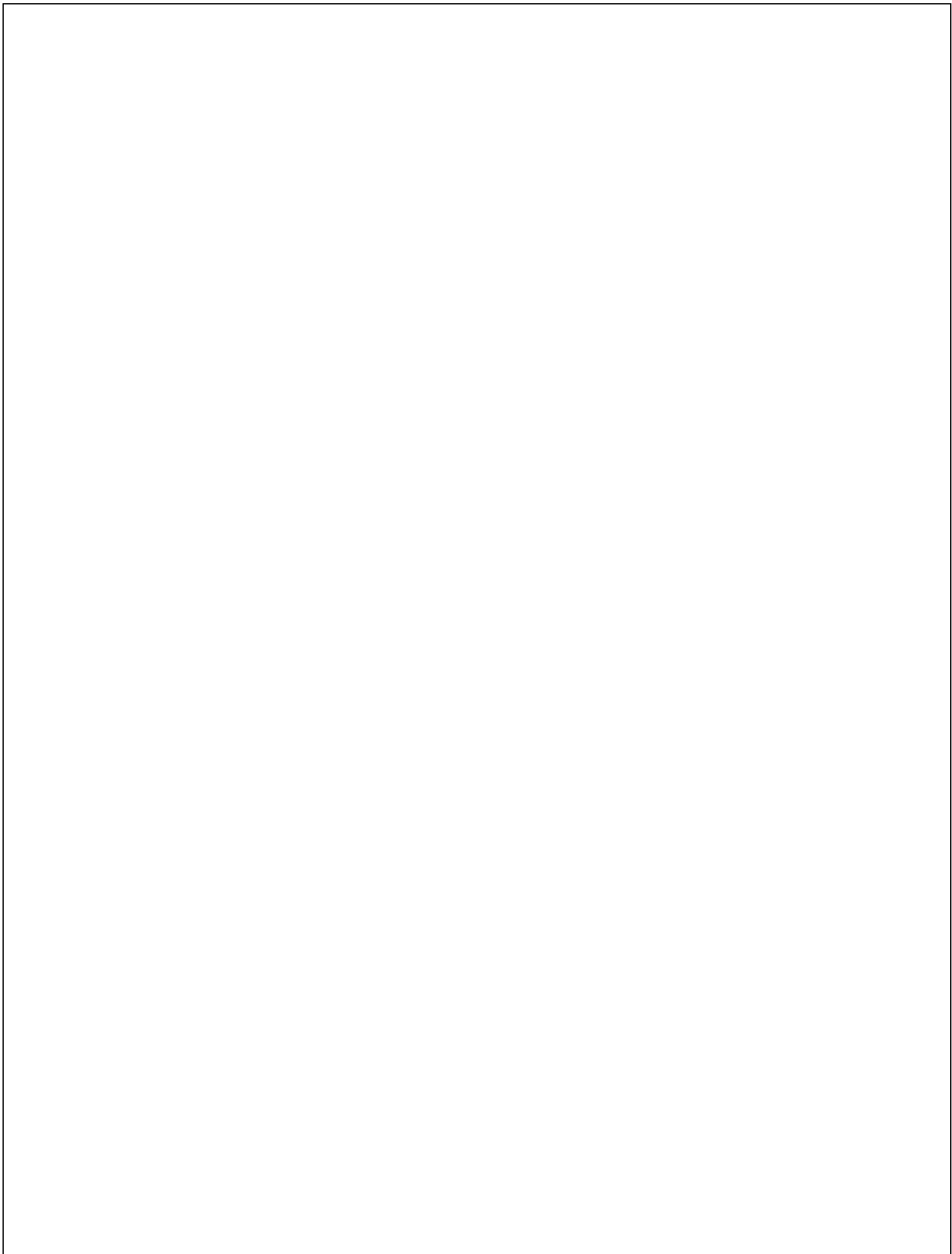
**Training Materials for**

**Encounter Form Editing and Design  
(MS Word)**

**and**

**Customizing User Preferences: Data  
Extract and Review**

**July 2001 (Rev January 2002)  
Indian Health Service  
Information Technology Support Center**





**RESOURCE AND PATIENT MANAGEMENT SYSTEM**

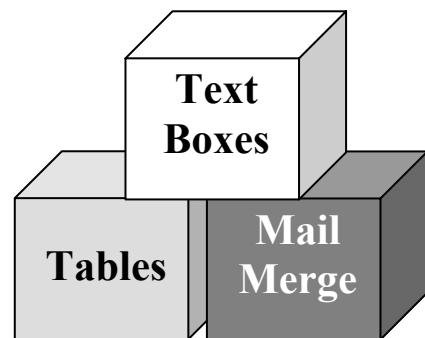
# **TRAINING MANUAL**

## **PCC+**

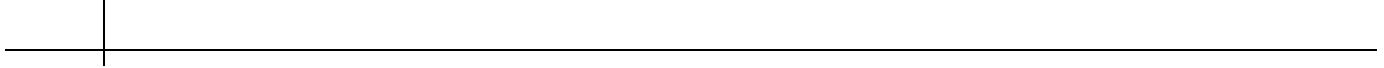
**CUSTOMIZABLE ENCOUNTER FORM &  
HEALTH SUMMARY PACKAGE**

**ENCOUNTER FORM EDITING AND DESIGN:  
MS WORD® FOR PCC+**

  
Version 1.1T3  
July 2001



**Information Technology Support Center  
Division of Information Resources  
Albuquerque, New Mexico**



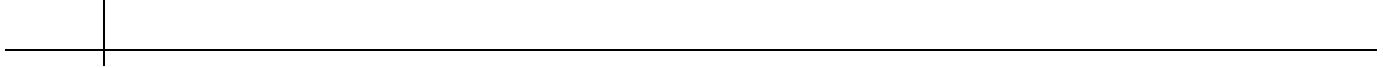
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## **ENCOUNTER FORM EDITING AND DESIGN:**

### **MS WORD® FOR PCC+**

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**Prepared by Full Circle Software  
for IHS Information Technology Support Center (ITSC)  
July 2001**



## Introduction

PCC+ Encounter Form templates are customized in Microsoft Word® by manipulating, changing, copying, deleting, and adding components to existing IHS Encounter Forms. In order to successfully and easily make changes, additions and deletions to the existing Encounter Forms and create your customized form, you will need a basic knowledge of MS Word® functionality. This section will go over the basic elements of MS Word® as they apply to Encounter Form development and customization.

NOTE: This training manual and sample templates, as well as other PCC+ user and technical documentation, is available in downloadable PDF format on the PCC+ web site: <http://www.ihs.gov/CIO/pccplus/>

## Objectives

All participants, at the end of this section, will be able to:

- Use basic features on the MS Word® toolbars to give MS Word® commands.
- Create and customize text boxes and tables.
- Use the mail merge function to create an Encounter Form.
- Copy components from pre-existing Encounter Forms to customize your site's Encounter Form(s).

## Check Your Knowledge

To check your knowledge of this section, you will:

- Create objects and figures using the MS Word® functions from this section.
- Modify and customize an existing Encounter Form.





## Review

### Toolbar Review

Toolbars contain buttons with images and menus. You will use the toolbars to give Microsoft Word® instructions about what you want to do. (Further information on menus and toolbars can be obtained from your PCC+ Users Guide.)

MS Word® toolbars and their icons make formatting and customizing Encounter Forms faster and easier. Let's review a few of the toolbar icons that you will be using during the customization process.

Command or Menu	Icon	Location	Function
Open		Standard Toolbar	Open a new MS Word® document.
Save		Standard Toolbar	Save the opened MS Word® document.
Print		Standard Toolbar	Print the opened MS Word® document.
Change Font Type	Times New Roman	Formatting Toolbar	Select a new font style for the selected text.
Change Font Size	11	Formatting Toolbar	Select a new font size for the selected text.
Change Font Style <b>Bold</b> <i>Italics</i> Underline		Formatting Toolbar	Bold, italics or underline the selected text.
Undo		Standard Toolbar	Undo the previous, typing, command or action and return to an earlier state. Multiple levels of undoing are allowed.
Help Menu		Menu Bar	Research and find the answer to MS Word® questions.

\*Anything not found as an icon on your toolbar, can be found under your menu bar options.



### Drawing Toolbar

The key to productive PCC+ template use is having the right tools at your fingertips. The Drawing toolbar is an essential tool when customizing an Encounter Form. If you are working with an existing Encounter Form template, your drawing toolbar may already be activated. The drawing toolbar is located at the bottom of your screen. If your toolbar is not activated, do so. (For more information on customizing your toolbar see the PCC+ Users Guide.)

1. Enter the application MS Word®.
2. Click ***View*** on the menu bar. A dropdown menu will appear.
  - Click ***Toolbars***.
  - Verify that the drawing toolbar is active. (If there is a  next to “Drawing” it is activated.)
  - Activate the drawing toolbar by clicking ***Drawing*** if necessary. The drawing toolbar will now appear on your screen.

## Text Boxes

When customizing an Encounter Form to meet your clinic's needs, you will find that all objects located on the existing Encounter Form (tables, objects, etc.) are placed in containers called text boxes. This is done so that the objects can be easily positioned and moved.

Any objects you add to the Encounter Form should be placed in text boxes for easy manipulation and positioning. The gray lines in the background will act as an anchor or a positioning guide for you.

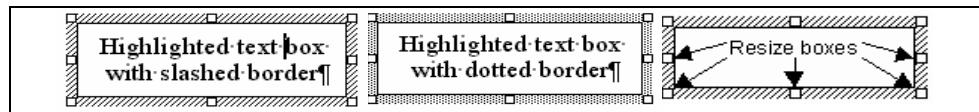
### Create a New Text Box

1. Click the  icon (text box function) on the drawing toolbar. The cursor will change to a + when it is moved onto the paper.
  - Position the + at the upper left corner of the page.
  - Click and hold the left mouse button and move the mouse toward the lower right corner of the page. A text box will appear. Make your box smaller or larger by dragging the corner with the mouse.
  - When the box is the desired size release the mouse button. The text box will be bordered with slashes and resizing marks.

### Borders

When highlighted, a border surrounds a text box. There are two types of text box borders.

- **Slashed border:** Only allows text editing.
- **Dotted border:** Allows the entire text box to be manipulated (i.e. copy, paste, delete).



**Figure 1:** Text box borders and resize boxes.

### Select a Text Box on the Encounter Form

- **Activate the dot border:** If there is no border on the text box, move the mouse over the edge of the object until it changes to four pointers. Left click and the text box will be selected and a dotted border will appear.
- **Activate a slashed border:** Move the mouse over the middle of the object and left click. The text box will be selected and a slashed border will appear. Notice when you activate the slashed border, the text cursor will flash in the location where the mouse was left clicked.
- **Change the border from slashes to dots:** Move the mouse over the border until it changes to four pointers. Then left click and the slashes will change to dots.

### Resizing and Moving

The resizing marks allow users to make the text box smaller or larger. (See Figure 1.) Marks in the corners of the text box allow manipulation in two dimensions simultaneously – height and width. Marks on the top, sides and bottoms of the text box manipulate height or width independently.

- To resize a text box:
  1. Place the mouse indicator on a resizing mark and left click.
  2. Continue to depress the left mouse button and drag to change the size of the box.
- To move a text box:
  1. Place the mouse position indicator on the border. A symbol of four pointers  will appear.
  2. Click the left mouse button, hold and drag the mouse. The text box will move. When the box is in the desired location, release the left mouse button.
  3. Fine tune text box placement using the arrow keys. While the box is highlighted with the dot border, press the arrow keys, the box will be nudged slightly in the direction of the arrow key.

- If the  feature (show / hide) is engaged, an anchor  will appear in the margin of the document when the text box is highlighted. This anchor indicates the line of the document that the text box is attached to. The anchor position is important as it locks the text box in place. If the text box is moved, the anchor will change positions. If a line that a text box is anchored to is moved or deleted, the text box will also be moved or deleted.

To move the anchor:

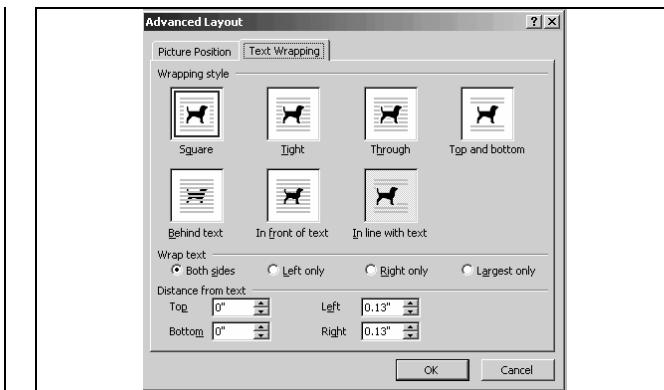
1. Place the mouse position indicator on the anchor and left click.
2. Hold down the left mouse button and drag the anchor to the desired location.
3. Release the left mouse button.

### Wrapping Text Around the Text Box

Existing text boxes on the Encounter Form will have their wrapping parameters set to “in front of text.” Any time a new text box is created, the wrapping parameters will need to be adjusted in order for the text box to be positioned harmoniously on the page with other objects. If existing text boxes are grouped or ungrouped the wrapping parameters will change and will have to be set to “in front of text.” While the text box is highlighted with either the dot or slash border, the wrapping parameter may be adjusted.

1. Select **Format** on the menu bar. A dropdown box will appear.
  - Click **Text Box**. The Format Text Box window will open.
2. Click the **Layout tab**.
  - Click the **Advanced button**. The *Advanced Layout* window will open. (See Figure 2.)
3. Click the **Text Wrapping tab**.
  - Select option **In front of text**. (Figure 2.)
  - Click **OK**.



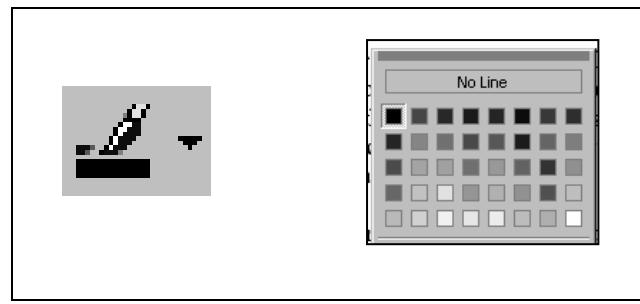


**Figure 2:** Wrapping

### Text Box Line Borders

Text boxes can have a lined border around the box or can have a transparent border. The lined border of a text box can be added or removed with the line function  icon on the drawing toolbar.

1. Click on the ***text box*** and activate a dotted border.
2. Click the ***line icon arrow*** (the down arrow to the left of the line icon). A dropdown window with line selections will appear. (See Figure 3.)
3. Click **No Line** and the border will disappear. (See Figure 3.)
4. Repeat this process, this time setting the line color to black. The line will re-appear. (See Figure 3.)

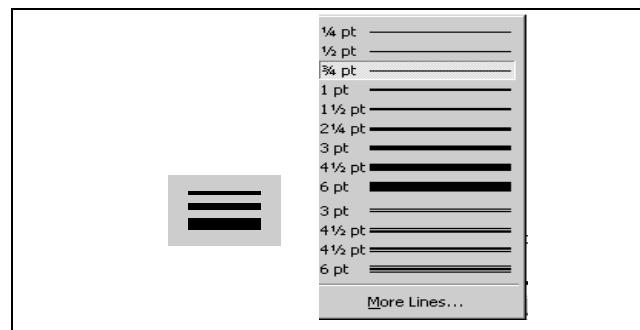


**Figure 3:** Text box borders.

You can choose the thickness of the text box line border using the line thickness icon. Create text boxes with thicker borders if you'd like to draw attention to the text box and its contents.

To change the thickness of the border line:

1. Click on the ***text box*** and activate a dotted border.
2. Click the ***line thickness icon***. A dropdown window with line selections will appear. (See Figure 4.)
3. Click the ***line thickness*** desired. (See Figure 4.)

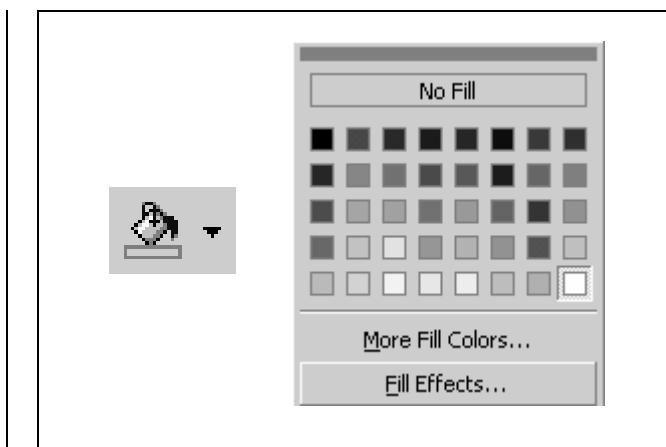


**Figure 4:** Text box border line thickness.

### Text Box Fill Colors

You can set the fill color of the text box with the fill color icon. Since the Encounter Form is not printed in color, the color choices are limited to black, white, shades of gray, and no fill color (i.e., a transparent box). Shading text boxes with important information will set them apart from other text boxes. Shading is a good way to designate a text box as “off limits” or “for coders use only,” etc.

1. Click the ***text box*** and activate the dotted border for the text box.
2. Click the ***fill color icon arrow*** (the down arrow to the left of the fill icon). A dropdown window with fill color selections will appear. (See Figure 5.)
3. Click ***no fill*** or ***the color*** of choice and the text box will become transparent or fill with the selected color. (See Figure 5.)



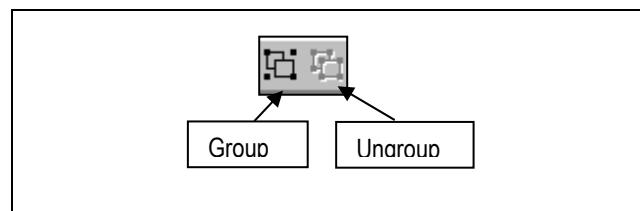
**Figure 5:** Text box fill colors.

### Group Text Boxes

Text box grouping is taking multiple objects and combining them as one object. This makes moving text boxes easier. Existing text boxes may be grouped. If a text box cannot be clicked and selected, it may be grouped with other text boxes. Grouped text boxes cannot be resized individually unless the grouping is turned off.

To join two or more text boxes into a single object:

1. Click **one box** and activate the dotted or slashed border.
2. Press **Shift** and while holding down the shift key, left click the **second text box**. Now both boxes will be highlighted.
3. Click the **group icon** to join the text boxes into one object. (See Figure 6.)
4. Reverse this by highlighting the joined object and clicking the **ungroup icon**.

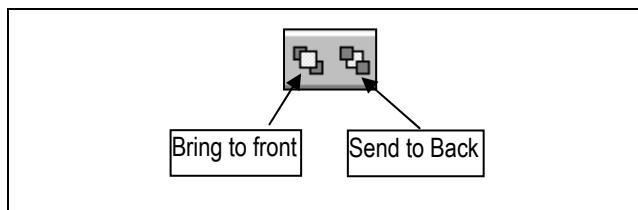


**Figure 6:** Grouping and ungrouping text boxes.

### Layering Text Boxes

Layering text boxes makes it possible to have objects overlap one another on the page. Layer text boxes using the bring to front or send to back icons.

1. Click the **text box** to be layered over another text box and click the **bring-to-front icon**. (See Figure 7.)
2. Click the **second text box** and click the **send-to-back icon**. (See Figure 7.)
3. Drag the text boxes so they partially overlay one another.
4. Reverse the process by clicking the **second text box** and clicking the **bring-to-front icon**.



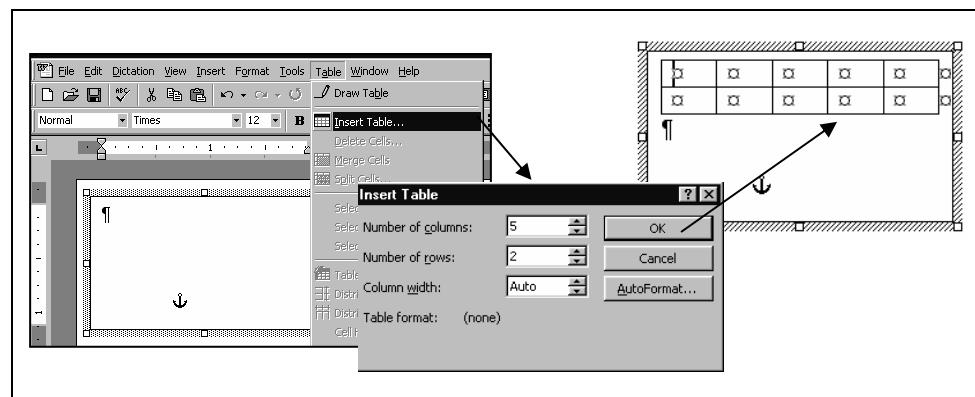
**Figure 7:** Layering text boxes.



## Tables

The Encounter Form you are customizing already has several tables on it. A table is made up of rows and columns of cells that can be filled with text and numbers. Tables on the Encounter Form can be used to organize and present information, align numbers in columns and sort and perform calculations. Always create tables within a text box so the table can be easily moved around the page.

1. Create a text box. Leave the text box with a slashed border (review previous section).
2. Click **Table** on the menu bar. (See Figure 8.)
  - Click **Insert Table**. The *Insert Table* window will open.
3. Type the **number of columns** desired in the Number of columns: field. (See Figure 8.)
  - Type the **number of rows** desired in the Number of rows: field.
  - Type the **column width** desired in the Column width: field or accept the default selection.
  - Click **OK** to create the table.



**Figure 8:** Create a table

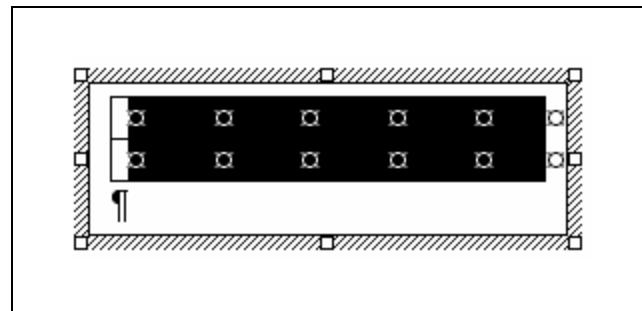
4. Set the text box border to no line. When working with tables the text box borders usually will not be needed.



### Highlighting a Table

There are several methods you can use to highlight the table. (See Figure 9.)

- Highlight one cell:
  1. Move the cursor over the left border of the cell until an arrow appears.
  2. Click the left mouse button once the arrow appears. That one cell will now be highlighted.
- Highlight several cells:
  1. Move the cursor over the left border of the first cell until an arrow appears.
  2. Click the left mouse button and hold it on the first cell.
  3. Hold and drag the mouse indicator to the last cell to be highlighted and release the mouse button. The cells will now be highlighted.
- Highlight cells using the arrow keys:
  1. Place the cursor in the first cell you wish to highlight.
  2. Press the **shift** key plus the **arrow key**. The cells will highlight one at a time each time the arrow key is pressed.



**Figure 9:** Highlighting a table.

## Changing Column Width and Row Height

The column width or row height can be adjusted to make a table fit better into the available space or for aesthetic reasons.

1. Click **Table** on the menu bar.
  - Click **Table Properties** (or cell height and width in Windows 98). The *Table Properties* window will open.
2. Click the **Row tab** to change the row height.
  - Click the **Column tab** to change the column width. (See Figure 10.)
  - Click **OK** to return to the highlighted table. (See Figure 10.)
  - The column width can also be changed by placing the mouse cursor on the line to be adjusted. A  $\leftarrow \parallel \rightarrow$  symbol will appear. This symbol captures the line and allows the line to be moved from side to side for vertical lines and up and down for horizontal lines.

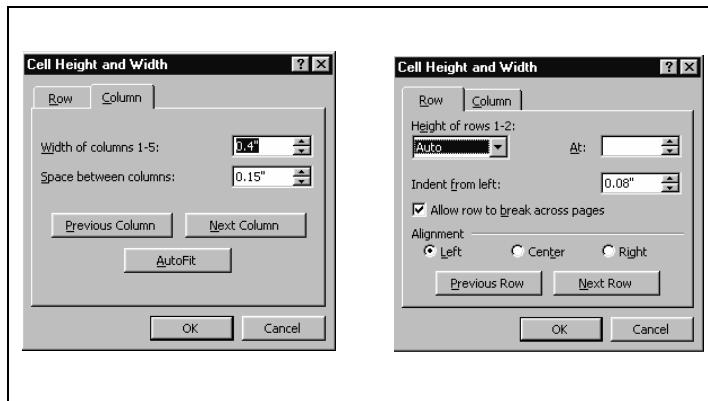


Figure 10: Changing column width and row height.

## Splitting and Merging Cells

Cells within a table may be split or merged. A merged cell appears as one cell that is larger than the surrounding cells. Merged cells are commonly used for the top row or title of a table. Split cells appear as two or more smaller cells (either vertical or horizontal) in relationship to the surrounding cells.

To merge cells:

1. Highlight the **cells** to be merged.
2. Select **Table** on the menu bar.
  - Click **Merge Cells**. The dividing lines will disappear between the cells. Text can be added across the entire cell or centered within the cell. (See Figure 11.)

3. Highlight the text and click the  **icon** (center text).
  - Typically, the title row (the table's top row) is a merged row.
  - If you resize the table after merging a row, you will have to resize that row separately.

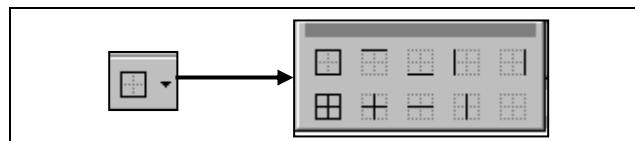
To split cells:

1. Highlight the **cells** to be split.
2. Select **Table** on the menu bar.
  - Click **Split Cells**. A *Split Cell* window will open.
3. Type the **number of columns and rows** desired. Click **OK**. (See Figure 11.)


**Figure 11:** Table with merged and split cells.

### Table Line Borders

Use table borders to divide and separate information in a table clearly and neatly. Individual lines surrounding a table or the entire border surrounding a table may be removed or added using the table line border icon on the standard toolbar. (See Figure 12.)



**Figure 12:** Table borders.

- Highlight the **table**.
- Click the **border icon**. A dropdown box with border selections will open. (See Figure 12.)
- To add or remove the top, bottom, right, left or internal border, click the icon that shows the border to be added or eliminated.

### Shading a Table

Shading cells, rows or columns will make the information stand out and easier to read. Shading every other row of a table, especially when a table's contents are small will make the table more legible.

1. Highlight the first row you wish to shade.
2. Select **Format** on the menu bar
  - Click **Borders and Shading**. The *Borders and Shading* window will open.
3. Click the **Shading** tab.
  - Click a **light shade of gray** from the Fill section. (Gray at 15% will work best if you intend to make photocopies of the document.)
  - Click **OK** to return to the table.
4. Position the cursor in the next line you wish to shade and click the **repeat icon**.
5. Continue with this procedure until all lines that require shading have been formatted. (The end result will look like Figure 13.)


**Figure 13:** Shading a table.

### Adding or Deleting Rows

Adding and removing rows from a table is a simple process. Deleting a row containing text, will delete both the row and the text.

1. Move the cursor to the bottom row of the table.
2. Click  **icon** (insert row) to add a row to the table.
3. Position your cursor on any part of a row.
4. Click the  **icon** (delete row) to delete the row from the table.





## Practice Exercise: Text Boxes and Tables

Use the skills you've just learned to complete the three activities listed below in MS Word®. If you need help with an activity, refer to the Check Your Work following this exercise, but first try to complete the activity without help.

1. Recreate Figure 11 using MS Word®.
  
2. Recreate Figure 13 using MS Word®.
  
3. Recreate the object shown below using MS Word®.

Temp	0	A	R	E	Pulse	Resp
Height (ins)						



## Check Your Work: Text Boxes and Tables

### 1. Recreate Figure 11.

- a. Create a text box.
- b. Select **No Line** using the text box border icon.
- c. Create a table with four rows and four columns inside the text box.
- d. Merge all cells in row one to make one large cell.
- e. Merge cells two and three of row two.
- f. Merge cell one of rows three and four.
- g. Merge cell two of rows three and four.
- h. Merge cell three of rows three and four.

### 2. Recreate Figure 13.

- a. Create a text box.
- b. Create a table with five rows and four columns inside the text box.
- c. Highlight row one. Use the Borders and Shading option from the Format menu to shade the entire row gray-15%.
- d. Repeat the shading process on row three and row five.

### 3. Recreate the object shown below.

- a. Create a text box.
  - Select **No Line** using the text box border icon.
- b. Create a table with 10 columns and 4 rows within the text box.
  - Select no border using the  icon (table border) or the Borders and Shading option on the Format Menu.
- c. Row One:
  - Change the font in all cells of row one to 8 pt, Arial, bold, centered.
  - Merge cells six, seven and eight of row one.
  - Merge the last two cells of row one together. You should now have seven cells in row one.
  - In row one type:  
**Temp** in cell one  
**Q** in cell two.  
**A** in cell three  
**R** in cell four.  
**E** in cell five.  
**Pulse** in cell six  
**Resp** in cell seven.

- d. Put a 1 ½ pt. border around rows one and two using the Format Borders and Shading option on the Format menu.
- e. Row Two:
  - Highlight cell one of row two. Put a ½ pt. border on the right border of cell one. Do the same to cell two, three, four, six, seven and nine.
  - Highlight cell five of row two. Put a 1 ½ pt. border on the right border of cell five. Do the same for cell eight. (Note: You may not notice the line thickness difference between the cells unless you magnify the screen 100% or higher.)
- f. Row Three
  - Merge cells one and two of row three.
  - Change the font in all of row seven to Arial, 8 pt., bold, centered.
  - Type Height (ins) in cell one of row three.
- g. Put a 1 ½ pt. border around rows three and four using the Format Borders and Shading option on the Format menu.
- h. Row Four:
  - Merge cells one and two of row four.
  - Merge the last two cells of row four.
  - Highlight cell one of row four. Put a ½ pt. border on the right border of cell one. Do the same for cell two.





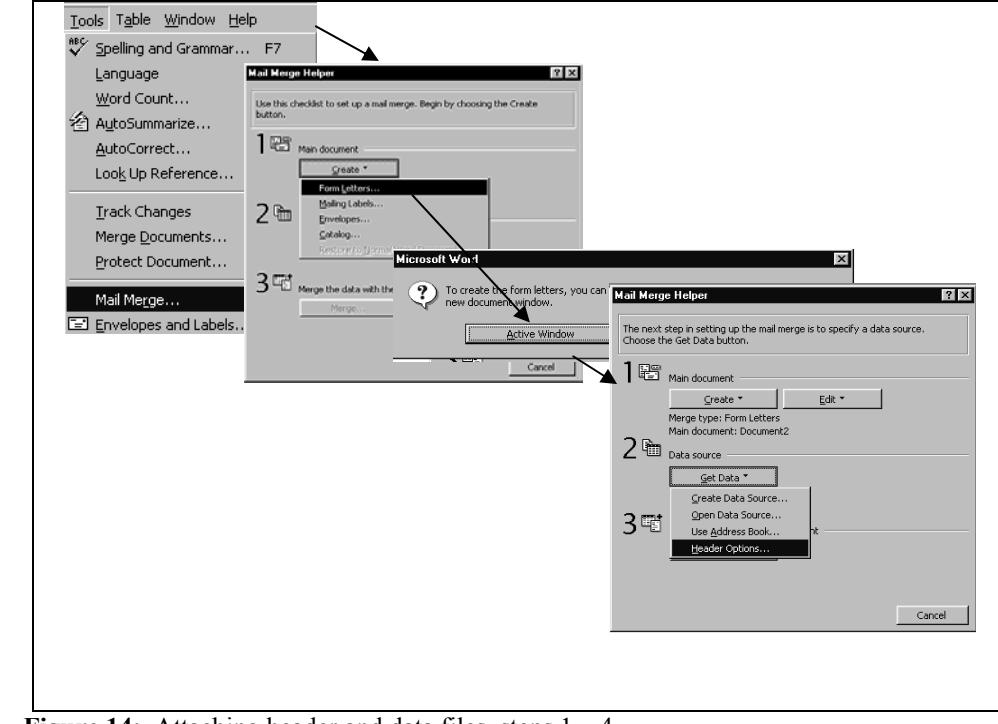
## Mail Merge

The next procedure to learn is performing a successful mail merge. Mail merge is a method of connecting a MS Word® document to a database. In this case, an Encounter Form will be connected to patient data, user preferences and site preferences stored in the PCC+ database. The secret of this technique is to imbed fields (connections to the PCC+ database) in the MS Word® document.

### Attaching Header and Data Files

First, attach header and data files to your form to create a mail merge document.

1. Click **Tools** from the menu. (See Figure 14.)
  - Click **Mail Merge**. The *Mail Merge Helper* window will open. (See Figure 14.)
2. Click the **Create** button. A dropdown menu will open. (See Figure 14.)
  - Click **Form Letters**. A window will open. (See Figure 14.)
3. Click **Active Window**. The *Mail Merge Helper* window will return to the front. (See Figure 14.)
4. Click the **Get Data** button. A dropdown menu will open. (See Figure 14.)
  - Click **Header Options**. (See Figure 14.) The *Header Option* window will open. (See Figure 15.)



**Figure 14:** Attaching header and data files, steps 1 – 4.



5. Click **Open** to specify a header. The *Open* window will appear. (See Figure 15.)
6. Select **All Files** from the Files of type: field. (See Figure 15.)
  - Select the header source: *c:\ilc\templates\ef\_header.txt*. (See Figure 15.)
  - Click **Open**. The *Mail Merge Helper* window will return to the front. (See Figure 15.)
7. Click **Get Data** again. A dropdown menu will appear. (See Figure 15.)
  - Click **Open Data Source**. The *Open Data Source* window will open. (See Figure 15.)
8. Select *Word documents* from the Files of type: field. (See Figure 15.)
  - Navigate to *c:\ilc\print\efdata.doc*. The *Header Record Delimiters* window will open. (See Figure 15.)
9. Select the **caret (^)** in the Field delimiter field and click **OK**. The *Mail Merge Helper* window will return to the front. (See Figure 15.)
10. Press the **Close button**. The Encounter Form is now able to use mail merge. The mail merge toolbar should now be visible (see Figure 16).

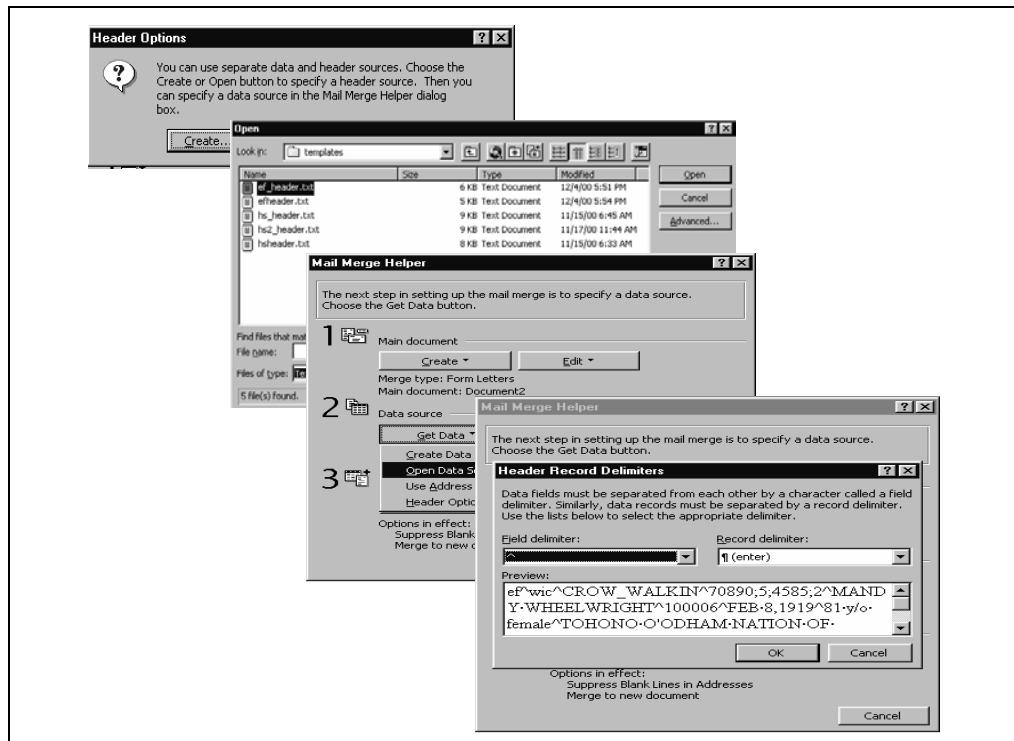


Figure 15: Attaching Header and data files, steps 5 – 9.

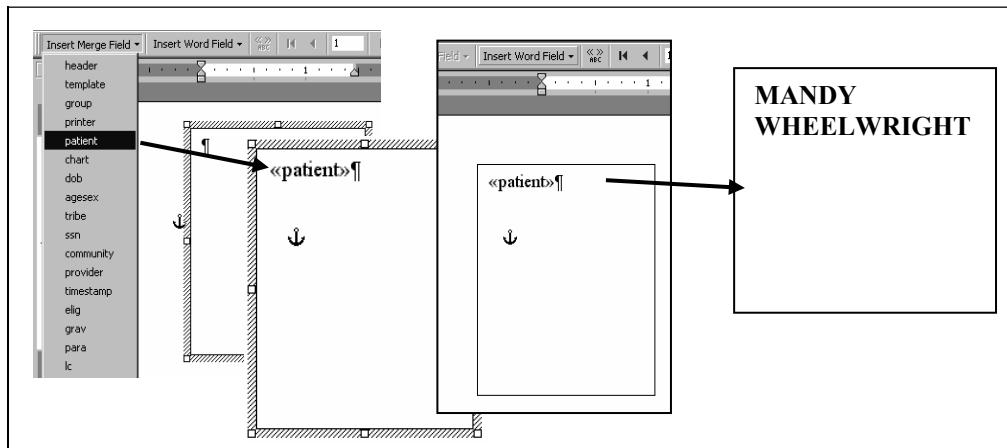


**Figure 16:** Mail merge toolbar, step 10.

## Fields

The next step is to actually move fields on to the Encounter Form. The fields are links to the PCC+ database.

1. Click the **Insert Merge Field** icon on the mail merge toolbar
  - If you are using MS Word 2000®, then press Alt + Shift + F, as this is the only way for the Insert Merge Field icon to work. A list of possible fields will be offered. Use the page down and arrow keys to more easily navigate the lengthy list. (Refer to Appendix B of the Users Manual for a full description of this list.) (See Figure 17.)
  - Double click on the desired field name. The field name bracketed by chevron stripes will appear. (See Figure 17.)
  - To view the merged component, click on the **View Merge Data** icon (view merge data) on the mail merge toolbar. The mail merge fields will change to normal text.



**Figure 17:** Fields, step 1.

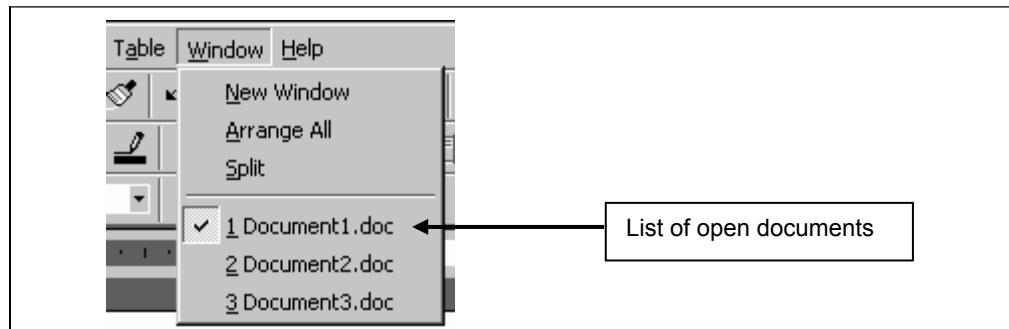
- To review the data source, place the cursor anywhere on the page that is not inside a table. Click the **Edit Data Source** icon located on the Mail Merge toolbar. The data will appear.
- If a field value is not present in the database, nothing will print on the form. There will just be a blank space.



## Copying Components

It is possible to copy pre-existing components from one form and paste them into another. Once the components are copied, they can be taken as is or edited. This approach is much easier than starting from scratch.

1. Open the Encounter Form you are customizing for your site.
2. Open the Encounter Form that contains the components to be copied (source document).
  - Toggle between the two documents by selecting **Window** on the menu bar. There is a list of open documents at the bottom of the drop-down menu. The document currently in use is marked with a . (See Figure 18.)



**Figure 18:** Toggle between documents.

- Go to the source document. Turn off mail merge by clicking on the **mail merge icon**. The document will revert to a display of only field names bracketed by chevrons. Mail merge must be off before copying and pasting items from the source document to the new document. Now the document is prepared for coping objects – including all of the existing database connections.
4. Highlight the object to be copied from the source document. (See Figure 19.) Click the **copy icon**. (See Figure 19.)

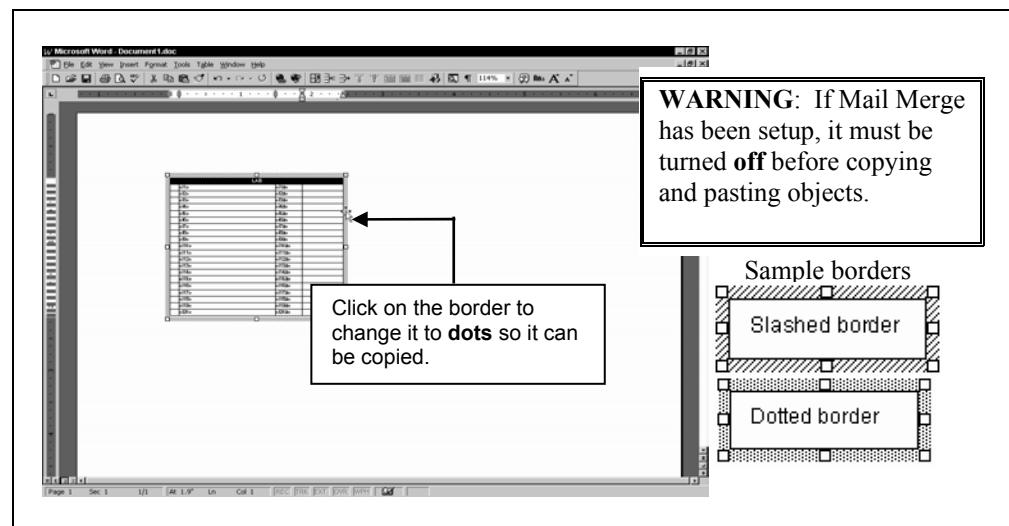


Figure 19: Copying components, method one, step 4.

5. Open the Encounter Form being customized. (See Figure 20.) Paste object to document by clicking the **Paste icon** on the toolbar. (See Figure 20.) Resize, as needed using the resizing boxes.

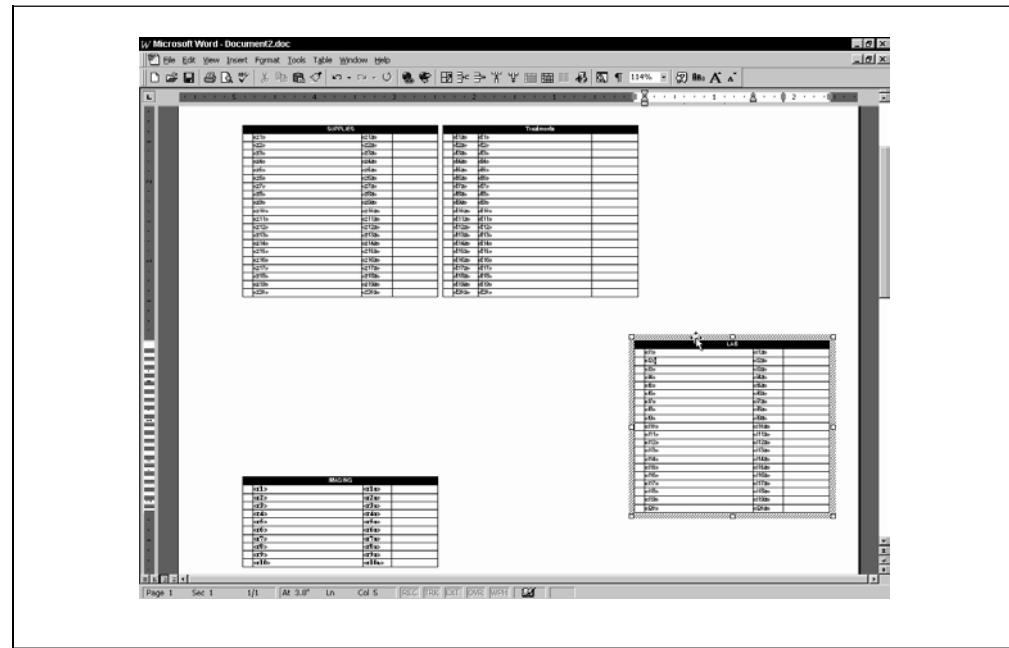


Figure 20: Copying component, method one, step 5.

## Practice Exercise: Mail Merge

To practice the information just learned, complete the following practice exercises. If you need help with the activity, refer to the Check Your Work following this exercise, but try to complete the activity without help first.

1. Start with a new, blank MS Word® document and create the Active Problems and Recent POVs table as shown below on the left. (Remember, the <> around letters or number indicate a field has been inserted.) Once you've created the table, go through the mail merge process and your table should look like the table on the right.

AIR	Active Problems and Recent POVs
<>p1<>	<>p1<>
<>p2<>	<>p2<>
<>p3<>	<>p3<>
<>p4<>	<>p4<>
<>p5<>	<>p5<>

Before Merge

AIR	Active Problems and Recent POVs
V14.0	ALLERGIC TO PEN V-K
599.0	UTI
428.0	CHF
714.0	RA
V22.1	PREGNANCY EDC 1-21-88

After Merging

2. Open the WIC template. Merge the template.
3. The clinicians at your site have recommended some minor changes to the WIC template. Review the recommended changes and make them.
  - a. Delete the allergies box from page two of the WIC template.
  - b. Redo page three of the WIC template to look like the example shown on the next page.



Allergies	<<a1>>	<<a2>>	<<a3>>	<<a4>>	<<a5>>						
Refills	CHRONIC MED LIST (ONLY 12 most recent) & New Prescriptions «md1» «mm1» «mq1» «ms1» «md2» «mm2» «mq2» «ms2» «md3» «mm3» «mq3» «ms3» «md4» «mm4» «mq4» «ms4» «md5» «mm5» «mq5» «ms5» «md6» «mm6» «mq6» «ms6» «md7» «mm7» «mq7» «ms7» «md8» «mm8» «mq8» «ms8» «md9» «mm9» «mq9» «ms9» «md10» «mm10» «mq10» «ms10» «md11» «mm11» «mq11» «ms11» «md12» «mm12» «mq12» «ms12» «md13» «mm13» «mq13» «ms13» «md14» «mm14» «mq14» «ms14» «md15» «mm15» «mq15» «ms15»			Chronic?	Remarks (Pharmacy Use Only)						
X	LAB	CPT	X	IMAGING	CPT	X	IMMUNIZATIONS	CPT	X	SUPPLIES & QTY	CPT
<<d1>>	<<d1a>>		<<d1>>	<<d1a>>		<<d1>>	<<d1a>>		<<z1>>		<<z1a>>
<<d2>>	<<d2a>>		<<d2>>	<<d2a>>		<<d2>>	<<d2a>>		<<z2>>		<<z2a>>
<<d3>>	<<d3a>>		<<d3>>	<<d3a>>		<<d3>>	<<d3a>>		<<z3>>		<<z3a>>
<<d4>>	<<d4a>>		<<d4>>	<<d4a>>		<<d4>>	<<d4a>>		<<z4>>		<<z4a>>
<<d5>>	<<d5a>>		<<d5>>	<<d5a>>		<<d5>>	<<d5a>>		<<z5>>		<<z5a>>
<<d6>>	<<d6a>>		<<d6>>	<<d6a>>		<<d6>>	<<d6a>>		<<z6>>		<<z6a>>
<<d7>>	<<d7a>>		<<d7>>	<<d7a>>		<<d7>>	<<d7a>>		<<z7>>		<<z7a>>
<<d8>>	<<d8a>>		<<d8>>	<<d8a>>		<<d8>>	<<d8a>>		<<z8>>		<<z8a>>
<<d9>>	<<d9a>>		<<d9>>	<<d9a>>		<<d9>>	<<d9a>>		<<z9>>		<<z9a>>
<<d10>>	<<d10a>>		<<d10>>	<<d10a>>		X	INJECTIONS	QT	CPT		<<z10>>
<<d11>>	<<d11a>>		<<d11>>	<<d11a>>		<<s1>>			<<s1a>>	X	DIAGNOSTIC EXAM
<<d12>>	<<d12a>>		<<d12>>	<<d12a>>		<<s2>>			<<s2a>>		CPT
<<d13>>	<<d13a>>		<<d13>>	<<d13a>>		<<s3>>			<<s3a>>		<<e1>>
<<d14>>	<<d14a>>		<<d14>>	<<d14a>>		<<s4>>			<<s4a>>		<<e2>>
<<d15>>	<<d15a>>		<<d15>>	<<d15a>>		<<s5>>			<<s5a>>		<<e3>>
<<d16>>	<<d16a>>		X	TREATMENTS	QTY	CPT			<<s6>>		<<e4>>
<<d17>>	<<d17a>>		<<d1>>			<<d1a>>			<<s6a>>		<<e5>>
<<d18>>	<<d18a>>		<<d2>>			<<d2a>>			<<s7a>>		<<e6a>>
<<d19>>	<<d19a>>		<<d3>>			<<d3a>>			<<s8a>>		<<e7a>>
<<d20>>	<<d20a>>		<<d4>>			<<d4a>>			<<s9a>>		<<e8a>>
X	PATIENT ED	CODE	<<d5>>			<<d5a>>			<<s10a>>		<<e9a>>
<<y1>>	<<y1a>>		<<d6>>			<<d6a>>			<<s10a>>		<<e10a>>
<<y2>>	<<y2a>>		<<d7>>			<<d7a>>			<<s12a>>		
<<y3>>	<<y3a>>		<<d8>>			<<d8a>>			Additional Exams, Treatments, Procedures, Tests		
<<y4>>	<<y4a>>		<<d9>>			<<d9a>>					
<<y5>>	<<y5a>>		<<d10>>			<<d10a>>					
<<y6>>	<<y6a>>		<<d11>>			<<d11a>>					
<<y7>>	<<y7a>>		<<d12>>			<<d12a>>					
<<y8>>	<<y8a>>		<<d13>>			<<d13a>>					
<<y9>>	<<y9a>>		<<d14>>			<<d14a>>					
<<y10>>	<<y10a>>		<<d15>>			<<d15a>>					
Plans, instructions, appointments, and referrals											
RTC in ____ days if not improved				Providers Signature:				X	E & M CODES	NEW	ESTABLISHED
									Expanded	99202	99212
									Detailed	99203	99213
									Comprehensive	99204	99214
									Complex	99205	99215
									Post-op/NC	99024	



## Check Your Work: Mail Merge

1. Start with a new, blank MS Word® document and create the Active Problems and Recent POVs table as shown below on the left. (Remember, the <> around letters or number indicate a field has been inserted.) Once you've created the table, go through the mail merge process and your table should look like the table on the right.
  - a. Create a text box.
    - Select **No Line** using the text box border icon.
  - b. Create a table with six rows and three columns.
  - c. Change the font for the entire table to Arial Narrow, 10 pt..
  - d. Shade rows one, three and five 15%-gray.
  - e. Merge the cells in row one.
  - f. Type **A | R   Active Problems and Recent POVs** in row one.
    - Center and bold the text.
  - g. Attach the header and data files by using the mail merge feature.
  - h. Insert field p1c in row two, column two, by pressing **Alt + Shift + F**. Repeat with p2c-p5c and p1-p5. Your table should look like the table on the left.
  - i. Click the **Mail Merge icon**, your table will change and look something like the table on the right.
  
2. Open the WIC template. Merge the template.
  - a. Follow the step-by-step instructions in the Mail Merge section of this manual.
  
3. The clinicians at your site have recommended some changes to the WIC template. Review the recommended changes and make them.
  - a. Delete the allergies box from page two of the WIC template.
    - a. Highlight the text box containing the allergies information. Press **Delete**.
  - b. Redo page three of the WIC template to look like the example shown on the next page.
    - a. Recreate the allergies box on top of the Chronic Medication List.
    - b. Modify the Chronic Medication List to appear like the example shown.
    - c. Add the remark column to the Medication List as shown in the example.
    - d. Move, cut, paste and resize the tables and text boxes on the page to appear as the example.





## APPENDIX A: SAMPLE FORMS





**RESOURCE AND PATIENT MANAGEMENT SYSTEM**

## **TRAINING MANUAL**

**PCC+**  
**CUSTOMIZABLE ENCOUNTER FORM &**  
**HEALTH SUMMARY PACKAGE**

## **MANAGING SITE USER PREFERENCES: ICD AND CPT CODES**

**July 2001 (Rev. January 2002)**



**Version 1.1T3**

**Information Technology Support Center  
Division of Information Resources  
Albuquerque, New Mexico**



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**Prepared by Full Circle Software  
for IHS Information Technology Support Center (ITSC)  
July 2001**



## Introduction

One of the key advantages of the new Encounter Form is that it can be highly customized to reflect individual patient information, and to incorporate the local clinical needs. Customizing the Encounter Form involves selecting, sorting and prioritizing the diagnostic preferences list (ICD9) and identifying the orderables list (CPT4).

Managing the user preferences can create a more useful, effective Encounter Form that will make the clinical staff, data entry and billing specialists jobs easier and save time in the long run. This training guide describes how lists of preferred diagnoses and orderables are generated, edited and saved.

As you are working through this manual, keep in mind that at times it may make sense to hard code the ICD-9 codes or Orderables instead of using the Excel utility. (i.e. A women's health clinic, cardiology clinic, or other specialty clinic where most of the patients are the same age. In these cases, the form can be hard coded, or you can use the edit ICD menu option to add these manually to a single provider.)

**NOTE:** This training manual, as well as sample template forms and other PCC+ user and technical documentation, is available in downloadable PDF format on the PCC+ web site: <http://www.ihs.gov/CIO/pccplus/>

## Objectives

Site managers/IT representatives, at the end of this section you will be able to:

- Extract the top 100 diagnoses across eight demographic categories for individual providers, specific provider groups (i.e. pediatricians) and/or all providers at a site using the special RPMS data mining software.
- Export the edited and sorted diagnoses list to the RPMS server.

All participants, at the end of this section you will be able to:

- Request that the site manager/IT representative extract specific diagnoses for you in order to customize the Encounter Form. You will have a basic understanding of the purpose of and how to extract diagnoses.
- Edit, with the assistance of coding staff, the list of ICD9 codes and narratives generated by the site manager. Eliminate invalid codes, split single codes into multiple entries to achieve greater specificity and correct ambiguous or invalid provider narrative.
- Sort the edited ICD9 codes and narratives by demographic group and edit, add or delete the ICD9 codes and narratives.
- Generate a set of orderables using the RPMS server-based tools.
- Add, delete and edit orderables on the list.

## Check Your Knowledge

To check your knowledge of this section, as a group you will

- Extract the top 100 diagnoses for one provider or a specific provider group (i.e. pediatricians) at your site.
- Begin editing the list of ICD9 codes and narratives and sort them by demographic category in MS Excel®. Import the ICD9 Preferences into RPMS and refine the data in RPMS.
- Generate a set of orderables using the RPMS server-based tools.
- Add, delete and edit orderables on the list.





## ICD9 on the Encounter Form

Refer to the sample Encounter Forms in Appendix C. Notice the location of the ICD9 codes on the different Encounter Forms.

### Features of the Encounter Form ICD9 Section:

- Customized by providers.
- Can print up to 54 ICD9 codes on an Encounter Form.
- Sorted according to diagnostic category: infant, children, teen males, teen females, adult males, adult females, senior males and senior females.

### Four Steps for customizing ICD-9 Codes

1. Extract top 100 diagnoses from RPMS.
2. FTP (file transfer protocol) extracted file to PC.
3. Use MS Excel® to edit codes.
4. FTP edited files to RPMS.





# Mine the RPMS System for User ICD9 Preferences

This process will generate a list of the top 100 diagnoses (both primary and secondary diagnosis are accessed) across eight demographic categories (i.e. a list of 800 diagnoses) for the designated providers.

From the PCC+ Managers Menu:

1. Type **EXTR** at the Select Manager's Menu for Encounter Form Option: prompt. (It may be a hidden menu.) Press **Enter**. (See Figure 1.)
2. Type the **date range** to begin the search with at the ENTER BEGINNING DATE: prompt.
  - The duration of this range depends on the size of the sample. Press **Enter**. (See Figure 1.)
3. Type the **ending date range** at the ENTER ENDING DATE: prompt. Press **Enter**. (See Figure 1.)
4. Type the **appropriate class** (Individual Providers, Provider Groups, or all Providers) at the prompt. Press **Enter**. (See Figure 1.)
5. Type the **provider class**. Press **Enter**. (See Figure 1.)
6. Type **Y** at the prompt, Are you sure you want to proceed? Press **Enter**. (See Figure 1.) The list will be compiled.
  - The extraction process stores this list in a file called ilc\_icd1.txt. If the RPMS is running on the Windows operating system, the path will be C:\ILC\. If RPMS is running under Unix, the path will be /usr/spool/uucppublic/ilc/.
  - If another search is run, it will override the first.
7. FTP the file to C:\Program Files\ILC\ILC FORMS PRINT SERVICE\CODES  
This places the data on the print server. If this step is not done, a run time error will occur when the ICD9 codes are imported.

```
Select Manager's Menu for Encounter Forms Option: EXTR
Extract most commonly used Diagnoses and Procedures..

ENTER BEGINNING DATE: T-180
ENTER ENDING DATE: T

Select one of the following:
  C      Certain Provider Class(es)
  P      Individual Provider(s)
  A      All

ENTER Code for Search Criteria:: C Certain Provider Class(es)
Enter Provider Class: PHYS
  1  PHYSICAL THERAPIST
  2  PHYSICIAN
  3  PHYSICIAN ASSISTANT
CHOOSE 1-3: 2
Enter another Provider Class:
This will take a while...
Are you sure you want to proceed?? Yes// Y
```

Figure 1: Sample dialogue for ICD9 preference extraction.





## Edit Preferences with Excel

The raw list of diagnoses just created must be edited before the data can be presented on the Encounter Form. This section describes the editing process. The editing tool is a version MS Excel® that has been enhanced with special macros to facilitate the editing process. The MS Excel® session has five steps:

1. Import
2. Edit (Change/Delete rows)
3. Sort data by demographic group
4. Edit (Add/Change/Delete rows)
5. Export

Initial experience suggests that up to 40% of the historical codes extracted with this utility are not optimal and therefore require modification. Edit codes with the assistance of an expert coder. Eliminate invalid codes, split single codes into multiple entries to achieve greater specificity and correct ambiguous or invalid provider narrative.

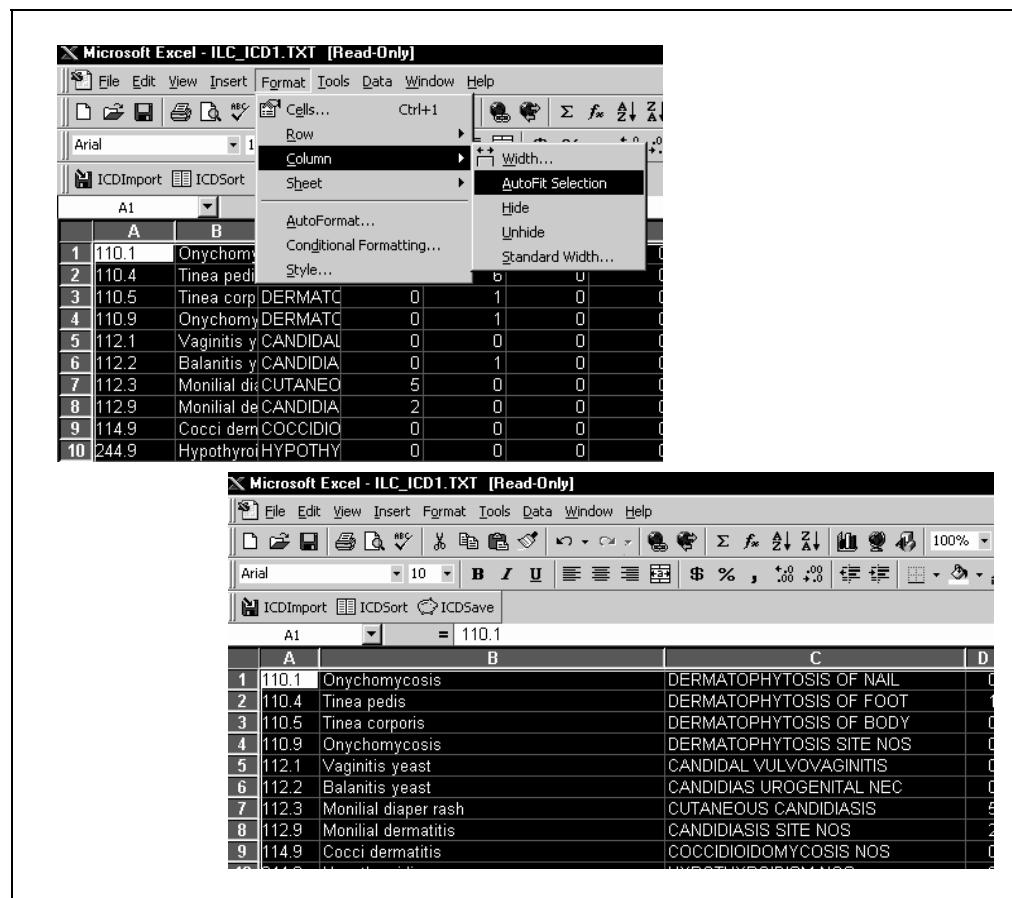
### Import & Edit ICD9 Codes

When you import the ICD9 codes the spreadsheet will be divided in columns A – M.

- Column A contains the ICD9 codes. The spreadsheet is sorted by Column A in ascending numeric order.
- Column B contains the most common provider narrative associated with the code.
- Column C contains the official ICD-9 description of the code.
- Ignore column D-M.
- The maximum number of characters allowed for any provider narrative is 27.
- Do not add any rows until the next step.



1. Open MS Excel®.
2. Click the ***ICDImport*** button to begin the sort process. A list of ICD9 codes and narratives will appear on the screen. (See Figure 2.)
3. Auto format the spreadsheet to provide better visibility of all column contents. (See Figure 2.)
  - Click the ***empty cell*** above the row labeled 1 and to the left of the column labeled A.
  - Click ***Format***.
  - Click ***Column***.
  - Click ***AutoFit Selection***. The column widths are automatically adjusted.



**Figure 2:** Auto format spreadsheet.

### Sorting ICD9 Codes

Once the initial editing and changes have been made, it is time to sort the data.

1. Click the ***ICDSort button***. The data will sort into eight separate spreadsheets for each demographic group in the following table.

Category	Age Range
Infants	0-2 years
Pediatrics	2-11 years
Adolescent Female	12-17 years
Adolescent Male	12-17 years
Adult Female	18-64 years
Adult Male	18-64 years
Senior Female	65 + years
Senior Male	65+ years

Figure 3: Sorting ICD9 codes.

2. Click the ***Infant Codes tab***.

- This spreadsheet contains five columns: Column A – ICD9 code; Column B - code narrative; Column C - official ICD9 narrative; and Column D - frequency. Ignore column E. (See Figure 3.)
- The maximum number of characters for column B is 27. (Only the first 27 characters from column B will appear on the Encounter Form.)
- Note that the spreadsheet is sorted by Column D, frequency of occurrence in descending order.

3. Change any codes necessary. (See Figure 4.)
- Click the cell and type the correction in the text box at the top of the spreadsheet.
  - Do not make any changes to columns C-E!

ICDImport			
B1		=	Onychomycosis
	A	B	
1	110.1	Onychomycosis	DEF
2	110.4	Tinea pedis	DEF
3	110.5	Tinea corporis	DEF

**Figure 4:** Change IDD9 codes.

4. Delete any rows necessary. (See Figure 4.)
- Right click on the row number located in the far left hand column. A dropdown menu opens.
  - Click Delete. The row disappears.
  - Do not add any rows until the next step.
5. When complete, delete all rows 55 and higher. The Encounter Form can only hold 54 preferences per demographic category.
6. Sort the entries by code or narrative. This step is optional. (See Figure 5.)
- Press Ctrl + A or click on the blank square in the upper left hand corner of the spreadsheet. The entire spreadsheet will be highlighted.
  - Click Data from the Menu Bar.
  - Click Sort. This will bring up the Sort window.
  - Make sure that the radio button marked “No header row” is selected.
  - Select the column to sort with (A or B) and the sort order (Ascending). Click OK and the sort will be completed.
7. Save the changes. If you need to stop the editing process and return later, be sure to save the file in Excel format (.xls document). If you save it as a text (.txt) document, you will not be able to export your changes and all your prior work will be lost.

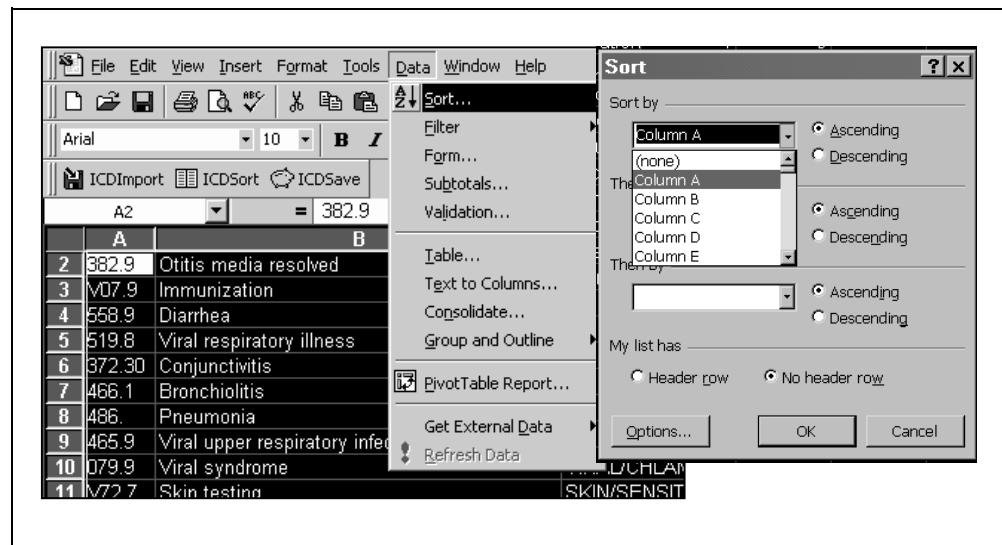


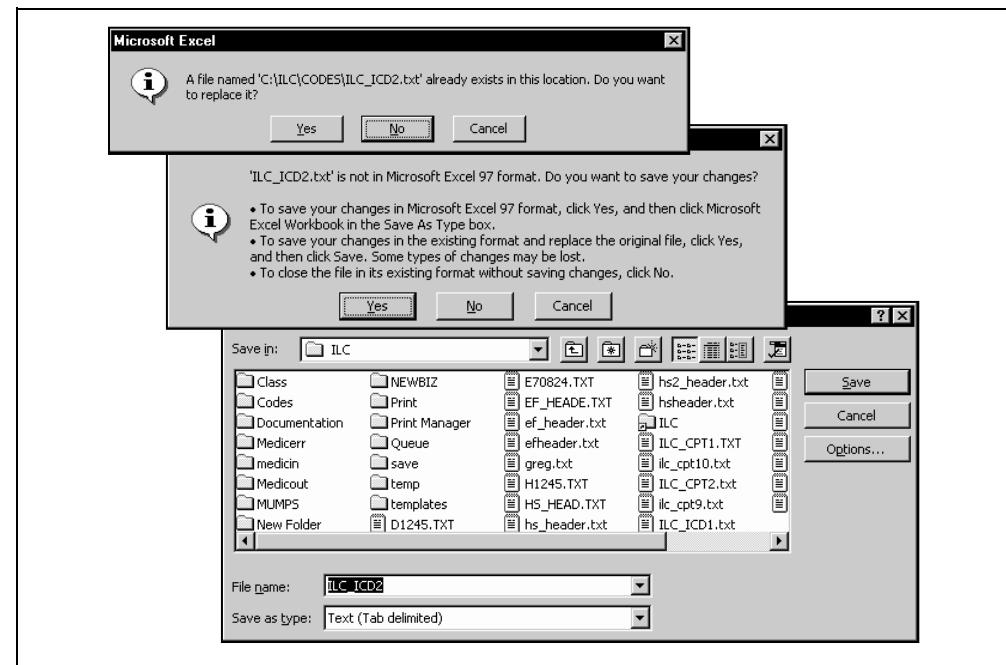
Figure 5: Sorting ICD9 codes.

8. Repeat the procedure for the other seven demographic categories, when the process for the infant's spreadsheet is complete. Do not touch the tab marked ICD9 Codes, as this is used for technical purposes only. Before exporting the data, each spreadsheet should be reviewed, reduced to 54 codes and sorted alphabetically or numerically.

### Exporting ICD9 Codes

The final step is to export the codes back to the PCC+ database on the RPMS server. The data will resort itself into one master document. This final sort may take several minutes.

1. Click the **ICD9 Export button**.
2. Click **Yes** if asked if you wish to replace the existing file ILC\_ICD2. (See Figure 6.)
3. Save the changes. (See Figure 6.)
  - Click **Yes**.
  - Click **Save**.



**Figure 6:** Exporting ICD9 Codes. Steps 1 – 2.

4. Move the file ILC\_ICD2.txt located on the print server in: C:\Program Files\ILC\ILC Forms Print Service\Codes to the RPMS server using FTP. (See Appendix A for step-by-step instructions to FTP the file.)
5. If the Server is running Unix, restore it to the public directory: /usr/spool/uucppublic/. If it is running Windows, restore it to c:\ilc\. This path must match the one recorded in the PATH TO PREFERENCE FILES field of the VEN EHP CONFIGURATION file.
6. Open the menu *VENMENU* on the RPMS server (See Figure 7.)
7. Type **MGR** on the *VENMENU* menu at the Select New Encounter Form Option: prompt and press **Enter**. (See Figure 7.)
8. Type **ICD** at the Select Manager's Menu for Encounter Forms Option: and press **Enter**. (See Figure 7.)
9. Name the provider to assign the preferences to a specific provider, or name the generic provider if the preferences will be assigned to a specialty group, for example Pediatrician. The VEN EHP ICD PREFERENCES file is now populated. This means that provider preferences can now appear on the new Encounter Form.

```
INS      Installation Utilities ...
MGR      Manager's Menu for Encounter Forms ...
PRNT     Print Forms ...
Select New Encounter Form Option: MGR

PRNT     Print Forms ...
MON      Monitor Print Deamon
GO       Start Print Deamon
STOP     Stop the Print Deamon
ICD      Import ICD Preferences from Excel
EXTR    Extract Preferences from PCC Database
SYS      Edit Orderables
QUE      Monitor the Check-In Queue
EDI      Edit ICD Preferences
Select Manager's Menu for Encounter Forms Option: ICD

You have collected preferences for a group of providers
These preferences must be assigned to a single provider; e.g.,
'PEDIATRICIAN'
Enter the name of this 'generic' provider: BBC,GENERIC PROVIDER
```

Figure 7: VENMENU on RPMS Server. Steps 5 – 8.





## Fine tuning the ICD9 List

Fine tuning the ICD9 list involves copy preferences from one provider to another and customizing (add, edit, delete) preferences for final presentation on the Encounter Form.

Begin with the primary menu option, VENMENU, and proceed as follows:

1. Type **EDI** at the Select Manager's Menu for Encounter Forms Option: prompt. Press **Enter**. (See Figure 8.)
2. Type the **encounter form name** to be worked on at the prompt. Press **Enter**. (See Figure 8.)
3. Type the **provider name** whose preferences will be edited at the Provider: prompt. Press **Enter**. (See Figure 8.)
4. Type **the number** corresponding with the desired demographic group at the prompt. Press **Enter**. (See Figure 8.)
  - The number of entries allowed and the number of entries selected at this point will appear.
  - The current list of ICD9 Codes will appear.
5. Type **the editing function** to be performed. Press **Enter**. (See Figure 8 and Figure 9.)
6. Perform edits. (Details on performing edits to follow.) (See Figure 10 and Figure 11)
7. Type **Y** at the Are you sure everything is OK? prompt. (See Figure 12.)
8. Type **Submit** at the prompt. (See Figure 12.)
9. Select the sort option preferred (type **A** to alphabetize the list, type **C** to sort the list by code, type **S** to save the list as is). Press **Enter**. (See Figure 12.)



```

Installation Utilities ...
INS
MGR    Manager's Menu for Encounter Forms ...
PRNT   Print Forms ...

Select New Encounter Form Option: MGR

PRNT   Print Forms ...
MON    Monitor Print Deamon
GO     Start Print Deamon
STOP   Stop the Print Deamon
ICD    Import ICD Preferences from Excel
EXTR   Extract Preferences from PCC Database
SYS    Edit Orderables
QUE    Monitor the Check-In Queue
EDI    Edit ICD Preferences

Select Manager's Menu for Encounter Forms Option: EDI

Encounter form name: BBC MEDICAL
Provider: BBC,GENERIC PROVIDER

Select one of the following:

1      Infants
2      Children
3      Teen Males
4      Teen Females
5      Adult Males
6      Adult Females
7      Senior Males
8      Senior Females

Patient group: 1
There is room for 54 entries on this form and you have selected 5 entries
BBC MEDICAL/BBC,GENERIC PROVIDER/Infants

1 Well child exam V20.2
2 URI 465.9
3 Acute superlative otitis media 382.00
4 Cough 786.2
5 Dermatitis 692.9

Select from 'ADD', 'EDIT', 'DELETE', 'COPY', 'SUBMIT', 'NEXT LIST', 'QUIT'
Your choice: (A/E/D/C/S/N/Q):

```

**Figure 8:** Fine tuning the ICD9 list. Steps 1 – 5.

FUNCTION	EXPLANATION
ADD	Add a new entry to the list
EDIT	Edit the narrative or ICD9 code of a single entry in the list
DELETE	Delete an entry from the list
COPY	Copy the entries of one provider to another
SUBMIT	Submit the draft list for final entry into the VEN EHP PREFERRED ICD FILE and close the transaction
NEXT LIST	Open up a new list for editing
QUIT	Quit this utility

**Figure 9:** The editing function.

### Adding / Editing a Preference

When adding or editing a preference the diagnostic narrative and the associated ICD9 code must be specified. You can enter any text the provider wants to use, or you can use the “official” ICD9 diagnostic narrative. The first character of the narrative should be capitalized and the rest lower case – unless the narrative is an acronym like ‘CHF’.

- **Wildcard:** It is legal to enter a partial ICD9 code (e.g., ‘848.\_’). In this case, the underscore prompts the user to fill in the blanks.) Use this partial ICD9 code method for diagnoses that have multiple ICD9 codes (e.g. sprains).

Starting from the Select from ‘ADD’, ‘EDIT’, ‘DELETE’, ‘COPY’, ‘SUBMIT’, ‘NEXT LIST’, ‘QUIT. Your choice: prompt:

1. Type A for add at the prompt. Press **Enter**. (See Figure 45.)
2. Type the entry name. Press **Enter**.
3. Type the ICD9 Code. Press **Enter**.

**OR**

1. Type E for edit at the prompt. Press **Enter**. (See Figure 45.)
2. Edit and type the narrative information.
3. Edit and type the ICD9 code.

**OR**

1. Type D for delete at the prompt. Press **Enter**. (See Figure 45.)
2. Select and type the information to be deleted.
3. Type Y at the Sure you want to delete? prompt.



```
Select from 'ADD', 'EDIT', 'DELETE', 'COPY', 'SUBMIT', 'NEXT LIST', 'QUIT'  
Your choice: (A/E/D/C/S/N/Q): A  
Insert new entry at what position? (1 - END of list): END// END of list  
Name of entry: Impetigo  
ICD Code: 684.  
  
1 Well child exam V20.2  
2 URI 465.9  
3 Acute otitis media 382.00  
4 Cough 786.2  
5 Dermatitis 692.9  
6 Impetigo 684.  
  
Want to add another entry? Yes// NO (No)  
There is room for 54 entries on this form and you have selected 11 entries  
BBC MEDICAL/BBC,GENERIC PROVIDER/Infants  
  
Select from 'ADD', 'EDIT', 'DELETE', 'COPY', 'SUBMIT', 'NEXT LIST', 'QUIT'  
Your choice: (A/E/D/C/S/N/Q): EDIT  
Edit entry from what position: (1-56): 3  
Name of entry: Acute otitis media Replace Acute With Acute superlative  
Replace  
ICD Code: 382._//  
  
1 Well child exam V20.2  
2 URI 465.9  
3 Acute superlative otitis media 382.00  
4 Cough 786.2  
5 Dermatitis 692.9  
6 Impetigo 684.  
  
Want to edit another entry? Yes// NO (No)  
Select from 'ADD', 'EDIT', 'DELETE', 'COPY', 'SUBMIT', 'NEXT LIST', 'QUIT'  
Your choice: (A/E/D/C/S/N/Q): DELETE  
Delete entry from what position: (1-11): 5  
Sure you want to delete Dermatitis? Yes//  
Etc...
```

**Figure 10:** Add, edit or delete from the ICD9 list.

### Copying a Preference

Starting from the Select from 'ADD', 'EDIT', 'DELETE', 'COPY', 'SUBMIT', 'NEXT LIST', 'QUIT. Your choice: prompt:

- a. Type **C** for add at the prompt. Press **Enter**. (See Figure 46.)
2. Type the **entry name**. Press **Enter**. (See Figure 46.)
3. Type the **ICD9 Code**. Press **Enter**. (See Figure 46.)

```

Select from 'ADD', 'EDIT', 'DELETE', 'COPY', 'SUBMIT', 'NEXT LIST', 'QUIT'
Your choice: (A/E/D/C/S/N/Q): COPY
Enter name of provider to copy from =>
Provider: IHS,GENERIC PROVIDER

Define the Patient Group to copy from =>

Select one of the following:

      1      Infants
      2      Children
      3      Teen Males
      4      Teen Females
      5      Adult Males
      6      Adult Females
      7      Senior Males
      8      Senior Females

Patient group: 1
BBC MEDICAL/IHS,GENERIC PROVIDER/Infants
1  Seasonal allergies 477.0
2  Acute bronchitis 466.0
3  Asthma w/o status asthmaticus 493.90
4  Teething syndrome 520.7
5  Vomiting 787.03
6  Atopic dermatitis 691.8

Target list: BBC MEDICAL/BBC,GENERIC PROVIDER/Infants
There is room for 54 entries on this form and you have selected 11 entries
BBC MEDICAL/BBC,GENERIC PROVIDER/Infants

1  Well child exam V20.2
2  URI 465.9
3  Acute superlative otitis media 382.00
4  Cough 786.2
5  Impetigo 684.
6  Seasonal allergies 477.0
7  Acute bronchitis 466.0
8  Asthma w/o status asthmaticus 493.90
9  Teething syndrome 520.7
10  Vomiting 787.03
11  Atopic dermatitis 691.8

```

**Figure 11:** Copying ICD9 codes.



```
Select from 'ADD', 'EDIT', 'DELETE', 'COPY', 'SUBMIT', 'NEXT LIST', 'QUIT'  
Your choice: (A/E/D/C/S/N/Q): SUBMIT  
The following list will be saved: BBC MEDICAL/BBC,GENERIC PROVIDER/Infants  
  
1 Well child exam V20.2  
2 URI 465.9  
3 Acute superlative otitis media 382.00  
4 Cough 786.2  
5 Impetigo 684.  
6 Seasonal allergies 477.0  
7 Acute bronchitis 466.0  
8 Asthma w/o status asthmaticus 493.90  
9 Teething syndrome 520.7  
10 Vomiting 787.03  
11 Atopic dermatitis 691.8  
  
Are you sure everything is OK? Yes// (Yes)  
  
Select one of the following:  
  
A ALPHABETIZE THE LIST AND SAVE  
C SORT BY CODE AND SAVE  
S SAVE  
  
Your choice: A
```

**Figure 12:** Sort ICD9 code information.

## CPT Preferences: Orderables

This section explains how to generate a list of site-specific preferences for orderables / CPT4 codes to use on the customized Encounter Form.

### Features of the Encounter Form Orderables Section:

- Include exams, immunizations, injections, labs, patient education, radiology supplies, treatments.
- Site specific.
- Grouped by infants, children, adult females and adult males.

The process of generating and fine-tuning the lists of orderables is similar to the process of generating lists of provider diagnostic (ICD9) preferences with two important exceptions.

- Do not mine the database to generate the list of orderable preferences. These preferences are contained in the table VEN EHP ORDERABLES when the PCC+ package is installed.
- There are only four demographic categories for orderables: infants, children, adult females and adult males. There are eight demographic categories for diagnostic preferences.

The standard set of orderables is included in the file ven\_0110.g. (It is not necessary to extract historical data, as with the ICD9 preferences, to generate the list.) When the globals in this file are restored, the file VEN EHP ORDERABLES will be populated. The contents of this file determine what appears on the Encounter Form.



### Fine Tuning the List of Orderables

The RPMS server-based tools for fine-tuning the list of orderables are virtually identical to the tools for fine-tuning the list of preferred diagnoses.

1. Type **MGR** at the Select New Encounter Form Option: prompt. (See Figure 13.)
2. Type **SYS** at the Select Manager's Menu for Encounter Forms Option: prompt. (See Figure 13.)
3. Type the **Encounter Form name** at the prompt. (See Figure 13.)
4. Type the **section of the form** to be worked on at the prompt. (See Figure 13.)
5. Type the **patient group** to be worked on. From this point on, you can add, delete, edit, copy and submit entries exactly as you did with the ICD9 preferences. (See Figure 13.)
6. Type **the editing function** to be performed. Press **Enter**. (See Figure 13.)
7. Perform edits. (See Figure 14.)
8. Type **Submit** at the prompt.
9. Select the sort option preferred (type **A** to alphabetize the list, type **C** to sort the list by code, type **S** to save the list as is). Press **Enter**. (See Figure 14.)



```

INS      Installation Utilities ...
MGR      Manager's Menu for Encounter Forms ...
PRNT     Print Forms ...
Select New Encounter Form Option: MGR

PRNT     Print Forms ...
MON      Monitor Print Deamon
GO       Start Print Deamon
STOP     Stop the Print Deamon
ICD      Import ICD Preferences from Excel
EXTR    Extract Preferences from PCC Database
SYS      Edit Orderables
QUE      Monitor the Check-In Queue
EDI      Edit ICD Preferences
Select Manager's Menu for Encounter Forms Option: SYS

*****  USER PREFERENCE MANAGER  *****

Encounter form name: BBC MEDICAL
Section of form: ???

Choose from:
EXAMS
IMMUNIZATIONS
INJECTIONS
LAB TESTS
PATIENT EDUCATION
RADIOLOGY EXAMS
SUPPLIES
TREATMENTS
Section of form: EXAMS

Select one of the following:
1           Infants
2           Children
3           Adult Males
4           Adult Females
Patient group: 1
There is room for 10 entries on this form and you have selected 9 entries
BBC/EXAMS/INFANTS

1 DDST 96111
2 EKG 93005
3 Hearing V5008
4 LP 62270
5 PPD 86580
6 Rectal Exam 50605
7 Tympanometry 92567
8 Vision 99173
9 Well Baby Exam

Select from 'ADD', 'EDIT', 'DELETE', 'COPY', 'SUBMIT', 'NEXT LIST', 'QUIT'
Your choice: (A/E/D/C/S/N/Q):

```

**Figure 13:** Fine tuning the list of orderables. Steps 1 – 6.

```
Select from 'ADD', 'EDIT', 'DELETE', 'COPY', 'SUBMIT', 'NEXT LIST', 'QUIT'  
Your choice: (A/E/D/C/S/N/Q): ADD  
You have room for 1 more entry  
  
Insert new entry at what position? (1 - END of list): END// END of list  
Name of entry: PDQ  
CPT Code: 996111  
  
1 DDST 96111  
2 EKG 93005  
3 Hearing V5008  
4 LP 62270  
5 PPD 86580  
6 Rectal Exam 50605  
7 Tympanometry 92567  
8 Vision 99173  
9 Well Baby Exam  
10 PDQ 996111  
  
Want to add another entry? Yes// NO  
Select from 'ADD', 'EDIT', 'DELETE', 'COPY', 'SUBMIT', 'NEXT LIST', 'QUIT'  
Your choice: (A/E/D/C/S/N/Q): SUBMIT  
The following list will be saved: BBC/EXAMS/INFANTS  
Are you sure everything is OK? Yes// YES  
  
Select one of the following:  
A ALPHABETIZE THE LIST AND SAVE  
C SORT BY CODE AND SAVE  
S SAVE  
Your choice: A
```

**Figure 14:** Fine tuning the list of orderables. Steps 7 – 9.

#### Number of Entries Allowed

The maximum possible number of preferences that can be included on the form is shown in section 3.2.3 of your Users Manual. This number is limited by the contents of the header file ef\_header.txt.

Customized forms may contain fewer entries (e.g., Figure 13 has been customized to contain fewer exam diagnostics).



## Practice Exercise: Mine RPMS, Edit Preferences, Orderables

To practice what you've just learned, complete the following exercise. Refer to the previous section for help if necessary.

1. The site manager/IT representatives should extract the provider preferences from RPMS for the clinic that will be the first to have the PCC+ installed at your site.
2. All participants, work as a team and review the information extracted.
3. Import the ICD9 codes extracted from RPMS.
  - Edit the codes and narratives, the expert coder, and a representative from Billing should provide assistance during this process.
4. Sort the ICD9 codes into the eight separate categories.
  - Select one of the eight categories, and further edit the ICD9 codes.
5. Export the ICD9 codes to RPMS
6. Fine-tune these preferences in RPMS using the steps you just learned.
7. Fine tune the list of orderables in RPMS. Discuss decisions to add, edit or delete entries.





## Appendix A: FTP Process

### FTP Process

1. Enter WS\_FTP 95 software.
2. Type the **IP address** in the **Host Name** field. Connect to the site.
3. From the Remote Site box navigate to the Pub directory.
  - Select **ILC\_ICD** file.
4. Navigate in the local system to: c:/ProgramFiles/ILC/ILCFormsPrint Service/Codes.
5. Drag and drop the ILC\_ICD file from the remote site to the local system.
6. Click **Close**.
7. Click **Exit**.
8. Enter Excel. Excel is set up to import that file automatically from Codes file.





## Appendix B: Quick Reference Guide

### Customizing User Preferences: Quick Reference Guide

1. Extract ICD9 Codes from RPMS
  - a. Select the MNGR option
  - b. Select EXTR
  - c. Enter a date range (three to four months recommended)
  - d. Select a Provider (enter last name)  
Or
    - Select a Provider Class  
Or
    - Select All (this allows you the option to then select a certain department)
  - e. Go to FTP
  - f. Select the PUB directory
  - g. Select file "ilc\_icd1.txt"
  - h. Make sure ASCII is selected  
Move to C:\Program Files\ILC\ILC FORMS PRINT SERVICE\CODES
2. Edit and Sort in Excel
  - a. Select ICD Import button
  - b. Adjust column width
  - c. Edit columns A & B (editing and deleting is only allowed at this point)
  - d. Select ICD Sort button (to sort codes into the 8 demographic groups)
  - e. Continue to edit column A & B
  - f. Add codes and descriptions where necessary
  - g. Delete rows 55 and higher in each demographic group
  - h. Save as a .xls excel worksheet while in progress
  - i. Sort codes by alpha or by ICD9 code
  - j. Select ICD9 Export button
  - k. System will save the file as ILC\_ICD2.txt



**3. Import ICD9 Codes to RPMS**

- a. Go to FTP
- b. Select ILC\_ICD2.txt
- c. Make sure ASCII is selected
- d. Move to RPMS
  - Select MGR
  - Select ICD
  - You now have the option to attach the codes to a specific provider, or to a clinic
  - If attaching the codes to all docs in a clinic, you must first assign a name for the doctors in that clinic. Then attach the codes to that name.
- e. Select Encounter Form name

**4. Edit ICD9 and Orderables in RPMS**

- a. Select EDI
- b. Select Encounter form
- c. Select Provider
- d. Edit the list by adding, deleting or changing any of the codes.
- e. Resort by either name or code
- f. Select SYS to edit orderables
- g. **Submit when completed. This will Save your work!**

## Appendix C: Sample Forms





# EXAMPLE OF UN-MERGED PCC+ WALK-IN FORM

Start Time: \_\_\_\_\_

Medical 01m Appt Walkin

«x29» «h1» «h2» «h3» «h4» «h5» «h6» «h7» «h8» «h9» «h10» «h40» S.O.

«h11» «h13» «h14» «h15» «h18» «h19» «h20» «h21» «h24» «h25» «h26» «h27»

## Chief Complaint/Visit Plans

Discipline	Initials

«provider»

KEY:  Normal  Abnormal  (blank) Not reviewed

Temp	FP: «fpm»
Pulse	Started
BP	«x22»
Wt	Capillary BG
Ht	O <sub>2</sub> saturation
LMP	Foot Check or Foot Exam (MF)
A_General	I_Musculoskeletal
B_Eyes	J_Skin
C_ENT	K_Neuro
D_Cardiovascular	L_Psych
E_Respiratory	M_Endocrine
F GI	N_Heme/Lymph
G_GU	O_Allergy/Immuno
H_Sexual Fxn	P_Other

## PHYSICAL EXAM

1_Vital Signs	«x14»
2_General	33_«x1»
<b>EYES</b>	34_«x2»
3_Conj/Lids	35_«x3»
4_Pupils	36_«x4»
5_Fundi	37_«x5»
<b>ENT</b>	38_«x6»
6_Ext ear/Nose	39_«x7»
7_EAC/TMs	40_«x8»
8_Hearing	<b>ABDOMEN</b>
9_Nasal mucosa	41_Mass,Inderness
10_Sinuses	42_Liver, spleen
11_Mouth	43_Hernia
12_Pharynx	44_Rectal
13_Thyroid	45_Stool Heme
14_Masses	<b>MUSCULOSKELETAL</b>
<b>RESPIRATORY</b>	46_Gait/Station
15_Effort	47_Digits/Nails
16_Percussion	48_Joints/Bones
17_Palpation	49_Muscles
18_Breath Sounds	Area examined
<b>HEART / CV</b>	50_Inspection
19_Palpation	51_Palpation
20_PMI	52_Range motion
21_Sounds	53_Stability
22_Carotid	54_Strength/Tone
23_Abd Aorta	<b>SKIN</b>
24_Femoral	55_Rash/Lesion
25_Pedal	56_Indurate/Nodule
26_Edema	<b>NEUROLOGIC</b>
<b>LYMPHATIC</b>	57_Cranial nerves
29_Neck	58_Reflexes
30_Axilla	59_Sensation
31_Groin	<b>PSYCH</b>
32_Other	60_Judgment
	61_Orientation
	62_Memory
	63_Mood/Affect
	«x10»
	«x11»
	«x12»
	«x13»

XRAY Provisional Dx:

Injury Date: Cause: Place: ETOH Work DV Related

LABS:

Key: ("P")=Primary Dx ("S")=Secondary Dx ("A")=Add Active problem ("I")=Inactivate problem ("R")=Remove problem

A/I R	ICD XX	ACTIVE PROBLEM & RECENT POVS	A/I	ICD ..	Commonly Used ICD Codes	Patient Education	Code
	«p1c»	«p1»		«d1c»	«d1»	«d35»	«d35c»
	«p2c»	«p2»		«d2c»	«d2»	«d36»	«d36c»
	«p3c»	«p3»		«d3c»	«d3»	«d37»	«d37c»
	«p4c»	«p4»		«d4c»	«d4»	«d38»	«d38c»
	«p5c»	«p5»		«d5c»	«d5»	«d39»	«d39c»
	«p6c»	«p6»		«d6c»	«d6»	«d40»	«d40c»
	«p7c»	«p7»		«d7c»	«d7»	«d41»	«d41c»
	«p8c»	«p8»		«d8c»	«d8»	«d42»	«d42c»
	«p9c»	«p9»		«d9c»	«d9»	«d43»	«d43c»
	«p10c»	«p10»		«d10c»	«d10»	«d44»	«d44c»
	«p11c»	«p11»		«d11c»	«d11»	«d45»	«d45c»
	«p12c»	«p12»		«d12c»	«d12»	«d46»	«d46c»
	«p13c»	«p13»		«d13c»	«d13»	«d47»	«d47c»
	«p14c»	«p14»		«d14c»	«d14»	«d48»	«d48c»
	«p15c»	«p15»		«d15c»	«d15»	«d49»	«d49c»
	«p16c»	«p16»		«d16c»	«d16»	«d50»	«d50c»
	«p17c»	«p17»		«d17c»	«d17»	«d51»	«d51c»
	«p18c»	«p18»		«d18c»	«d18»	«d52»	«d52c»

AIR	ADDITIONAL PURPOSE OF VISIT	( ) DNKA	Appt Length:

Notes for problem: Remove Note

Notes for problem: Remove Note

Notes for problem: Remove Note

«patient»  
#«chart»  
DOB: «dob»  
«timestamp»

«x29»  
SSN: «ssn»  
«b27»

«agesex»

VCN: «uid»

Allergies	«a1»	«a2»	«a3»	«a4»	«a5»
Refills	CHRONIC MED LIST (ONLY 12 most recent) & New Prescriptions			Chronic?	Remarks (Pharmacy Use Only)
	✓ =Refill △ =Change Write Controlled Subs & Changes on bottom				
	«md1» «mm1» «mq1» «ms1»				«mr1»
	«md2» «mm2» «mq2» «ms2»				«mr2»
	«md3» «mm3» «mq3» «ms3»				«mr3»
	«md4» «mm4» «mq4» «ms4»				«mr4»
	«md5» «mm5» «mq5» «ms5»				«mr5»
	«md6» «mm6» «mq6» «ms6»				«mr6»
	«md7» «mm7» «mq7» «ms7»				«mr7»
	«md8» «mm8» «mq8» «ms8»				«mr8»
	«md9» «mm9» «mq9» «ms9»				«mr9»
	«md10» «mm10» «mq10» «ms10»				«mr10»
	«md11» «mm11» «mq11» «ms11»				«mr11»
	«md12» «mm12» «mq12» «ms12»				«mr12»

X	IMMUNIZATIONS	Dose		X	INJECTIONS	DOSE	RN		X	INFUSION	QTY	RN		OTC Per Wt	DM SUPPLIES
«i1»	# 123 4	«i1a»			Allergy Shot #		951			IV Infusion		90788		Apap	Accucheck 82962
«i2»	# 123 4	«i2a»			B12					D5W / LR /NS /D5NS		J7		Actifed	Alcohol A4245
«i3»	# 123 4	«i3a»			Depo Provera		J1055							Afrin	BG Strips A4253
«i4»	# 123 4	«i4a»			Epogen		Q0136							Bacitracin	Lancet A4259
«i5»	# 123 4	«i5a»			Gold		J1600							Benadryl	Syringe ½ cc
«i6»	# 123 4	«i6a»			Ketorolac		J1885							Debrox	Syringe 1cc A4206
«i7»	# 123 4	«i7a»			Meperidine		J2175			CARDIOPULM				Fleet	
«i8»	# 123 4	«i8a»			Methotrexate		J9250			Electrocardiogram		93005		GGDM	
«i9»	# 123 4	«i9a»			Promethazine		J2550			Oximetry		94760		Kaopectate	
«i10»	# 123 4	«i10a»			Rocephin		J0696			Nebulizer Treatment:		94664		Maalox	SCREENED:
					Terbutaline		J3105			Nebulized Drug:		J7619		Sudafed	CHECKED
										Peak Flow Study		94060		HC 1% Cr	COUNSELED:
										Pulmonary Function		90410		Saline Nose/Eye	RETURNED:

FRACTURE & DISLOCATION		JOINT ASPIRATE/INJECT		OB/GYN		LACERATION REPAIR		PROCEDURES	
BONE/JOINT SITE:		Small Joint	20600	Colposcopy	57452	Location:		Surgical tray	A4560
Manipulation/ Reduction		Medium	20605	Colpo with biopsies	57452	Size (cm):		Abcess I & D	10060
Wound Repair		Large	20610	Endometrial / Endocerv Bx	58100	Simple		Abcesses [multiple][complex]	10061
Recasting-specify				IUD [Insert] [Remove]	5830	Intermed		Breast Cyst Aspiration	19000
Cast Removal or Repair	297			Antepartum Care	5942	Tendon Involved		Ear Cerumen Removal	69210
		Unna Boot	29580	Maternity: Fetal NonStress	59025	Debridement	976	Ear FB Removal	69200
		Trigger Point Injection	20550	Postpartum Care	59430			Intravenous Catheter start	36000
ORTHO SPLINTS/CASTS		PATIENT SUPPLIES		BURN CARE		Lesion(s) Penis Destruction			
Splint [Finger] [Hand] [ Wrist]	291	ABD Dressings	A6217	Kerlex [width ]	A6264			Lesion(s) Vulva Destruction	565
Splint, Arm: [Short] [Long]	291	Ace Wrap [width ]	A4460	Kling [width ]	A6263	Location:		Nail Debridement	11720
Cast, Arm: [Short] [Long]	290	Brace / Splint / Support		Knee imobilzer [Lgth ]	L1830	BSA %	1° 2° 3°	Nail Debridement	11750
Splint,Leg: [Short] [Long]	295	(off the shelf)		OpSite		Small		Nose FB Removal	Nail Matrix
Cast,Leg [Short][Long][Cylindr]	293	Site:		Rib Belt [male] [female]	A4572	Medium		Skin I & D, FB Removal	30300
Walker [Short] [Long leg]	293	Cervical Collar	L0120	Slings [sm] [med] [lrg]	A4565	Large		Skin Excisional Biopsy	10120
Cast Boot	L3260	DuoDerm	A624	Tape [width ]	A4454	Debridement	976	SkinTag Removal[1-10] [10+]	11100
Cast material [fibrglas] [plastr]	A45	Gauze[<4x4][≥4x4][# ]	A62	Urinary Catheter		Anesthetic used [Yes] [No]		Urethral Catheterization	53670
Crutches	E0112	Irrigation Sol'n, sterile	A4712	Wound cleansers				Wart Destruction [1-14] [14+]	1711
Cane	E0100	Kaltostat -Sq Inches:	A619			CPR	92950		

Plans/Instructions/Referrals:	Nursing Only Visit	99211	Healthy Visit	993
	(New)99201	Minimal, Self Limited		(Estbl)99211
	99202	CC Hist 3, ROS 0, 1 organ sys/ body area		99212
	99203	CC Hist 3, ROS1, 2-7 o. s./ b.a.		99213
	99204	CC Hist4, ROS 2-9, 2-7 o. s./ b.a.		99214
	99205	CC Hist 4, ROS 10-14, 8-12 o. s./ b.a.		99215
	Prolonged Visit 1st Hr	99354	Counselling : 15 min 30 min	9940

RTC:	Signature:
------	------------

«patient»

#«chart»

DOB: «dob»

«timestamp»

«x29»

SSN: «ssn»

«agesex»

VCN: «uid»

RX Pickup Signature/Date

# EXAMPLE OF MERGED PCC+ WALK-IN FORM

Start Time: \_\_\_\_\_

**Medical 01m Appt Walkin**

Designated Provider: TOM  
**CREELMAN**  
 — INFLUENZA 21-Oct-2000  
 — 1-HEP B 21-Oct-2000  
 — 1-PNEUMO-PS 21-Oct-2000  
 — Td-ADULT 21-Oct-2000  
 — Last BREAST EXAM: 10/21/00  
 — Last RECTAL EXAM: 10/21/00 -  
 Abnl

Last PAP: 12/29/98 (NOT ENTERED)

S.O.

## Chief Complaint/Visit Plans

Discipline	Initials

Provider: TOM CREELMAN

KEY:  Normal  Abnormal  (blank) Not reviewed

Temp		FP: Natural methods
Pulse	Resp	Started Pk Flow
BP		Capillary BG
Wt		O <sub>2</sub> saturation
Ht		Foot Check or Foot Exam (MF)
LMP		
A General	I Musculoskeletal	
B Eyes	J Skin	
C ENT	K Neuro	
D Cardiovascular	L Psych	
E Respiratory	M Endocrine	
F GI	N Heme/Lymph	
G GU	O Allergy/Immuno	
H Sexual Fxn	P Other	
<b>PHYSICAL EXAM</b>		
1 Vital Signs	33 Vulva	<b>FEMALE</b>
2 General	34 Vagina	
<b>EYES</b>		35 Urethra
3 Conj/Lids	36 Cervix	
4 Pupils	37 Adnexa	
5 Fundi	38 Uterus	
<b>ENT</b>		39 Bladder
6 Ext ear/Nose	40 RectoVag	
7 EAC/TMs		<b>ABDOMEN</b>
8 Hearing	41 Mass,Inderness	
9 Nasal mucosa	42 Liver, spleen	
10 Sinuses	43 Hernia	
11 Mouth	44 Rectal	
12 Pharynx	45 Stool Heme	
13 Thyroid		<b>MUSCULOSKELETAL</b>
14 Masses	46 Gait/Station	
<b>RESPIRATORY</b>		47 Digits/Nails
15 Effort	48 Joints/Bones	
16 Percussion	49 Muscles	
17 Palpation	50 Area examined	
18 Breath Sounds		<b>HEART / CV</b>
	51 Inspection	
	52 Palpation	
	53 Range motion	
	54 Stability	
	55 Strength/Tone	
	56 Rash/Lesion	
	57 Indurate/Nodule	
	58 Cranial nerves	
	59 Reflexes	
	60 Sensation	
	61 Judgment	
	62 Orientation	
	63 Memory	
	64 Mood/Affect	
	65 Masses	

XRAY Provisional Dx:

Injury Date: Cause: Place: ETOH Work DV Related

LABS:

**Key: ("P")=Primary Dx ("S")=Secondary Dx ("A")=Add Active problem ("I")=Inactivate problem ("R")=Remove problem**

A/I/R	ICD XX	ACTIVE PROBLEM & RECENT POVS	A/I	ICD ..	Commonly Used ICD Codes	Patient Education	Code
	493.90	ASTHMA		789.00	Abdominal pain	Nutrition	G F P
	714.0	RHEUMATOID ARTHRITIS		461.9	Acute Sinusitus	Folic Acid	g f p
	995.2	PENICILLIN ALLERGY		477.9	Allergic rhinitis	Exercise	g f p
	401.9	HYPERTENSION		493.90	Asthma	Tobacco Cessation	G F P
	250.00	DM		490.	Bronchitis	Tobacco:Now Former never	
	-----POVs-----			724.2	Chronic low back pain	Drugs/Ethoh	G F P
	V60.2	FINANCIAL NEEDS/ASSIST		780.9	Chronic pain	HIV Pre/Post	G F P
	V60.1	HOUSING		250.00	DM Type 2	HIV POV Signed Consent	G F P
	821.00	LEG FRACTURE		311.	Depression	STD	G F P
	V72.6	LABS FOR DM PE		729.1	Fibromyalgia	Contraception	G F P
	V76.41	CANCER SCREEN		530.81	GERD	Seat Belts	G F P
	465.9	UPPER RESPIRATORY INFE		784.0	Headache	Smoke Detectors	G F P
	V72.2	DENTAL/ORAL HEALTH VIS		401.9	Hypertension	Tooth Brushing	G F P
	V25.09	fp visit		346.90	Migraine headache	Aspirin Therapy	G F P
	599.0	UTI		V22.1	Prenatal care	Colon Ca Screen	G F P
				714.0	Rheumatoid arthritis	DV	P N S
				465.9	URI	Breast Self Exam	G F P
				599.0	UTI	Other:	G F P

AIR	ADDITIONAL PURPOSE OF VISIT	( ) DNKA	Appt Length:

Notes for problem: Remove Note

Notes for problem: Remove Note

Notes for problem: Remove Note

### PATIENT DEMO

#3

DOB: JUL 1, 1951

JUN 30,2001@19:53

PLAN,OREGON MEDICAID

49 y/o female

Designated Provider: TOM CREELMAN

SSN:123 45 6789

GEHA,AARP HEALTH,REGENCE LIFE AND HEALTH,MAIL HANDLERS BENEFIT

Allergies	PENICILLIN ALLERGY																
Refills	CHRONIC MED LIST (ONLY 12 most recent) & New Prescriptions						Chronic?	Remarks (Pharmacy Use Only)									
	✓ =Refill   △ =Change   Write Controlled Subs & Changes on bottom																
	JUN 30,2001 ALBUTEROL INHALER 17 SH IN2P PRN F DRY COUGH OR WHEE~							Pt needs spacer									
	JUN 30,2001 GLYBURIDE 5MG 30 T1T PO QD FDM							needs fbs next visit									
X	IMMUNIZATIONS	Dose		X	INJECTIONS	DOSE	RN	X	INFUSION	QTY	RN	OTC Per Wt	DM SUPPLIES				
	ADMIN IMMUNIZATION	# 1 2 3 4	9047_		Allergy Shot #			951_	IV Infusion		90788	Apap	Accucheck 82962				
	Flu	# 1 2 3 4	90724		B12				D5W / LR / NS /D5NS		J7_	Actifed	Alcohol A4245				
	Hep A Adult	# 1 2 3 4	98632		Depo Provera			J1055				Afrin	BG Strips A4253				
	HEP B Adult/Ped	# 1 2 3 4	86632		Epogen			Q0136				Bacitracin	Lancet A4259				
	MMR	# 1 2 3 4	90707		Gold			J1600				Benadryl	Syringe ½ cc				
	PPD	# 1 2 3 4	86580		Ketorolac			J1885				Debrox	Syringe 1cc A4206				
	Pneumovax	# 1 2 3 4	90732		Meperidine			J2175	CARDIOPULM			Fleet					
	Td Adult	# 1 2 3 4	90718		Methotrexate			J9250	Electrocardiogram		93005	GGDM					
		# 1 2 3 4			Promethazine			J2550	Oximetry		94760	Kaopectate					
		# 1 2 3 4			Rocephin			J0696	Nebulizer Treatment:		94664	Maalox	SCREENED:				
					Terbutaline			J3105	Nebulized Drug:		J7619	Sudafed	CHECKED				
									Peak Flow Study		94060	HC 1% Cr	COUNSELED:				
									Pulmonary Function		90410	Saline Nose/Eye	RETURNED:				
FRACTURE & DISLOCATION		JOINT ASPIRATE/INJECT			OB/GYN			LACERATION REPAIR			PROCEDURES						
BONE/JOINT SITE:		Small Joint	20600		Colposcopy	57452		Location:			Surgical tray						
Manipulation/ Reduction		Medium	20605		Colpo with biopsies	57452		Size (cm):			Abcess I & D						
Wound Repair		Large	20610		Endometrial / Endocerv Bx	58100		Simple			Abcesses [multiple][complex]						
Recasting-specify					IUD [Insert] [Remove]	5830		Intermed			Breast Cyst Aspiration						
Cast Removal or Repair		297_			Antepartum Care	5942		Tendon Involved			Ear Cerumen Removal						
					Unna Boot	29580		Maternity: Fetal NonStress			Ear FB Removal						
					Trigger Point Injection	20550		Postpartum Care			Intravenous Catheter start						
ORTHO SPLINTS/CASTS		PATIENT SUPPLIES						BURN CARE			Lesion(s) Penis Destruction						
Splint [Finger] [Hand] [Wrist]		291_		ABD Dressings	A6217	Kerflex [width ]	A6264					Lesion(s) Vulva Destruction					
Splint, Arm: [Short] [Long]		291_		Ace Wrap [width ]	A4460	Kling [width ]	A6263	Location:			Nail Debridement						
Cast, Arm: [Short] [Long]		290_		Brace / Splint / Support		Knee immobilizer [Lgth ]	L1830	BSA %	1°	2°	3°	Nail Debridement					
Splint, Leg: [Short] [Long]		295_		(off the shelf)		OpSite		Small				Nose FB Removal					
Cast, Leg [Short][Long][Cylindr]		293_		Site:		Rib Belt [male] [female]	A4572	Medium				Nail Matrix					
Walker [Short] [Long leg]		293_		Cervical Collar	L0120	Slings [sm] [med] [lrg]	A4565	Large				Skin I & D, FB Removal					
Cast Boot		L3260		DuoDerm	A624_	Tape [width ]	A4454	Debridement				Skin Excisional Biopsy					
Cast material [fibrglas] [plastr]		A45_		Gauze[<4x4]>4x4][# ]	A62_	Urinary Catheter		Anesthetic used [Yes] [No]				SkinTag Removal [1-10] [10+]					
Crutches		E0112		Irrigation Sol'n, sterile	A4712	Wound cleansers		URGENT CARE				Urethral Catheterization					
Cane		E0100		Kaltostat -Sq Inches:	A619_			CPR				53670					
								92950				Wart Destruction [1-14] [14+]					
												1711					

#### **Plans/Instructions/Referrals:**

Nursing Only Visit	99211	Healthy Visit	993
(New)99201	Minimal, Self Limited		(Estb)99211
99202	CC Hist 3, ROS 0, 1 organ sys/ body area		99212
99203	CC Hist 3, ROS1, 2-7 o. s./ b.a.		99213
99204	CC Hist4, ROS 2-9, 2-7 o. s./ b.a.		99214
99205	CC Hist 4, ROS 10-14, 8-12 o. s./ b.a.		99215
Prolonged Visit 1 <sup>st</sup> Hr	99354	Counselling :	15 min 30 min 9940

RTC:

**Signature:**

## PATIENT DEMO

PATIENT DEMO  
#3  
DOB: JUL 1,1951  
JUN 20, 2001 @ 10:52

4

Designated Prov  
CON 402-45-6700

SSN:123 45 6789  
CELA AARP HEALTH INSURANCE LIFE AND HEALTH MAIL HANDLERS BENEFIT PLAN Q

ALTH, MAIL HA  
VCN: 3 EOA

---

RX Pickup Signature/Date

# Encounter Form & Health Summary Form

V 1.1

Last PAP: 06/20/88 (1)  
 Last GLUCOSE: 11/29/89 (112)  
 Last PPD: Unknown  
 Last MAMMO: 03/01/00 - NI  
 Last PELVIC: 01/29/90 - NI  
 Last BREAST EXAM: 01/29/90 - Abnl  
 Last RECTAL EXAM: 01/29/90 - NI  
 Last PNEUMOVAX: Unknown  
 Last FLU: Unknown  
 Last TD: Unknown

Discipline	Initials												
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> </table>							<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> </table>						
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**CROW - WALK IN (28)**  
**Provider: PETER SCHORE**

Allergies  
 Pen VK causes hives 1/4/96

Chief Complaint & Visit

FP Method		G 5	P 2	LC 2	SA 3	TA 0	Surgical sterilization			LMP	NOW	PAST	NEVER	ENV	CTQ								
Temp	Pulse	Resp	BP	Weight	Height	Pk Flow	O2 Sat	Glucose	Vision	π Corr	π Uncorr	1.1	1	3	5	6	7						
TOBACCO USE																							
ROS		J Endocrine		5. Fundi		NECK		22 Femoral bruit		30 Rectum		Area ex		NEURO		MUSC/SKEL		FEMALE					
A General		K Heme		6 Cover test		ENT		14 Supple		23 Pedal pulse		31 Stool heme		37 Inspection		45CN II-XII		54 Gait, Station		61Vulva			
B Eyes		M GU		7 Ext ear/nose		15 Thyroid		16 Masses		24 Edema		32 Umbilicus		38 Palpation		46 Reflexes		55 Digits, Nails		62Vagina			
C ENT		N Skin/Nails												MUSC		39 Rg of Motn		47 Strength		56 Joints,Bones		63Urethra	
D Resp		O Other		8 Hearing		HEART C/V		25 Effort		33 Gait, Station		40 Stability		48 Sensation		57 Muscles				64Cervix			
E C/V		1 Vital Signs		9 TMs,Canals		17 Auscultation		26 Lungs		34 Digits, Nails		41 Strength,tone		49 Symmetry				Breast		65Adnexa			
F GI		2 General		10 Nasal mucosa		18 Palpation		ABD		35 Joints,Bones		SKIN		50 Muscle tone				58Co		67Uterus			
G Mus/Skel		EYES		11 Mouth		19 PMI		27 Palpation		36 Muscles		42 Rash		PSYCH				59d/c		Bladder			
H Neuro		3 Conj/Lids		12 Pharynx		20 Carotid bruit		28 Liver/Spleen		43 Induration		51 Orientation		60 Masses				68RectoVag					
I Psych		4 PERLA		13 Sinuses		21 Abd bruit		29 Hernia		44 Nodules		52 Memory		53 Mood. Affect									
4 if Normal		X or Circle if Abnormal and write comment		Blank or no mark means Not Checked																			

◀ Provider Signature

Continued on back

## AIR Active Problems and Recent POVs

-----	-----POVs-----
250.00	DM
401.9	HTN
879.8	LACERATION
465.9	URI
491.9	COPD
493.90	ASTHMA
995.2	ALLERGY TO DISALCID
354.0	CARPAL TUNNEL SYNDROME
V07.9	IMMUNIZATION
172.7	MELANOMA R GREAT TOE
V58.9	SEEN IN PLASTIC SURGER
V72.0	NO OCULAR PATHOL
692.9	DERMATITIS, DM II, MED
V72.6	PELVIC EXAM
366.16	NUCLEAR SCLEROSIS
079.9	VIRAL SYNDROME RESOLVI
466.0	BRONCHITIS.ACUTE
276.8	HYPOKALEMIA
362.01	MILD BACKGROUND DIABET

A I	A I	ICD9 Pick List	A I
789.0	Abdominal pain	595.9	Cystitis
646.63	Acute pyelonephritis	250.00	DM Type 2
477.9	Allergic rhinitis	311.	Depression
626.0	Amenorrhea	250.00	Diabetes mellitus, type II
280.9	Anemia, iron deficiency	250.60	Diabetic amyotrophy
493.90	Asthma	558.9	Diarrhea
724.5	Backache	V25.09	Family planning counselling
250.50	Background diabetic retinop	729.1	Fibromyalgia
490.	Bronchitis	530.81	GERD
466.0	Bronchitis acute	V58.1	Gold therapy 500mg total
682.6	Cellulitis right lower leg	784.0	Headache
724.2	Chronic low back pain	V65.4	Health maintenance exam
780.9	Chronic pain	787.1	Heartburn
577.1	Chronic pancreatitis	401.9	Hypertension
585.	Chronic renal failure	V06.8	Immunization
571.5	Cirrhosis of the liver	703.0	Infected ingrown toenail
564.0	Constipation	686.9	Infected I great toe, mild
491.9	Copd	V25.1	Intrauterine device inserti

Notes for problem:

Notes for problem:

**RAE WATERMAN**

JAN 22,2001@10:04 Tribe: TOHONO O'ODHAM NATION OF ARIZONA

SSN: 000 12 0001 Community: SELLS

**#100003**

40 y/o female

DOB: NOV 10,1960

IHS Eligibility: DIRECT ONLY

VCN: 100003.160A

## **Encounter Form & Health Summary Form**

v1.1

## CROW - WALK IN (28)

Refill	Current Medications (12 most recent) and New Prescriptions	X	PATIENT EDUCATION	CODE
	01/16/01 (C) LISINOPRIL 10MG TABS #30 (30 days) Take 1 QAM		CA Prevention	
	/11/01 KETACONAZOLE 200MG TAB #6 (3 days) Take 1 BID -- Ran out 01/14/01		DM Diet	
	01/04/01 IBUPROFEN 400MG #30 (5 days) Take 2 TID -- Ran out 01/09/01		DM Foot care	
			Diet	
			Drugs/ETOH	
			Exercise	
			Seat Belts	
			Tobacco	
		X	INJECTION	OT
			Allergy shot #_	951
			Cephazolin	90782
			Depo Provera	90782
			IV Infusion	90788
			Ketorolac	90782
			Meperidine	90782
			Methotrexate	J9250
			Promethazine	90782
			Rocephin	J0696
			Terbutaline	J3105

X	LAB	CPT	X	IMAGING	CPT	X	TREATMENTS	QTY	CPT
	Art Blood Gas	90724		Abdomen	74000		Cast		29
	BUN/Creat	80065		Ankle	73600		Cerumen removal		69210
	CBC	85034		C-Spine	72040		Cyst Rmv		
	Chlamydia	86632		CXR	71010		Draw blood		36415
	ETOH	82055		Clavicle	73000		FB Rmv		10120
	GC	87592		Elbow	73070		I&D		10060
	Glucose (strip)	82948		Foot	73620		IUD In/Out		583
	HCT	85014		Hand	73120		Nail Rmv		117
	LFTs	80061		Hip	73500		Splint		29
	Lytes	80051		Jaw	70100		Start IV		36489
	Preg Test (Urine)	81025		Knee	73560		Suture Loc		
	Pro Time - INR	85610		LS-Spine	72100		Triq Pt Inj		20550
	RPR	86592		Mammogram	76092		Venipuncture		36000
	SMAC 20	80053		Ribs	71100		Wart Rmv		17110
	Serum Glucose	82947		Shoulder	73030				
	Stool Culture	87045	X	DIAGNOSTIC EXAMS		CPT	X	IMMUNIZATIONS	
	TSH	84443		Breast Exam	G0101		Flu		90724
	Throat Culture	87060		EKG	93005		Hep A Adult		98632
	UA	81000		Hearing	V5008		Hep B Adult		90746
	Urine Culture	87086		PAP Smear	Q0091		PPD		86580
X	E&M Codes	New	Established	PPD	86580		Pneumovax		90732
	Expanded	99202	99212	Pelvic Exam	57410		Td Adult		90718
	Detailed	99203	99213	Physical exam					
	Comprehensive	99204	99214	Rectal Exam	50605				
	Complex	99205	99215	Stool Occult Bld	G0107				
	Post-op/NC	99207	99024	Vision	99173				

#### **Additional Exams Treatments Procedures Tests**

X	SUPPLIES	QTY	CPT
	AC Splint		L3670
	Ace Wrap		A4460
	Alc. Swabs		A4245
	Cane		E0100
	Cast Boot		L3260
	Crutches		E0112
	Gauze		A62
	Knee Brace		L1830
	Nebulizer supp		E0601
	O2		E0431

#### **Plans, instructions, appointments and referrals**

## RSBCIHI Dental Encounter Record

Dental 50-002 (Revised 1/00)

## Notes

2. Problems and POVs	
POVs-----	
250.00	DM
401.9	HTN
879.8	LACERATION
465.9	URI
491.9	COPD
493.90	ASTHMA
995.2	ALLERGY TO DISALCID
354.0	CARPAL TUNNEL SYNDROME
V07.9	IMMUNIZATION
172.7	MELANOMA R GREAT TOE
V58.9	SEEN IN PLASTIC SURGER
V72.0	NO OCULAR PATHOL
692.9	DERMATITIS, DM II, MED
V72.6	PELVIC EXAM
366.16	NUCLEAR SCLEROSIS
079.9	VIRAL SYNDROME RESOLVI
466.0	BRONCHITIS ACUTE
276.8	HYPOKALEMIA
362.01	MILD BACKGROUND DIABET

AI |# D |

## Purpose of Visit

2.1 PROCEDURES AND TREATMENTS											
ADA		BILL	DIAGNOSTIC	ADA		BILL	ANESTHESIA/ANALGESIA	ADA		BILL	PERMANENT
0110	5001	Office Exam		9250		Injectables (antibiotics, premed, anesthetics)		2140	5036	One Tooth Surface	
0130	5003	Office exam (injury)		9230	5197	N.O Analgesic per Visit		2150	5037	Two Tooth Surfaces	
9430	5202	Office Visit		9630	5240	Drug Rx		2130	5034	Three Tooth Surfaces	
9440	5203	Prof. Visit After Hours						2161	5040	Four (or more) Tooth Surfaces	
1120	5018	Prophylaxis 1-4 years						2954	5073	Steel and Post Buildup	
1170	5017	Prophylaxis Treatment					PERIODONTICS	2330	5041	Acrylic Plastic or Composite	
1201	5020	Topical Fluoride to Age 14 (incl. prophylaxis)		1130	5019	Periodontal Scaling		2335	5044	Acrylic Plastic Restoration (prox surface,incisal)	
1202	5020	Topical Fluoride (incl. prophylaxis)		4910	5096	Periodontal Exam					
1351	5025	Topical/Sealants per Tooth		4930		Emergency Treatment					
1330	5024	Oral Hygiene Instructions		4341	5095	Subgingival Currettage					FIXED PROSTHETICS
9110	5196	Emergency Treatment (palliative)					Root Planning per Quad	2751	5057	Porcelain with Metal	
				4330			Correction of Occlusion per Quad	2790	5060	Gold	
								2950	5070	Crown Buildup, Pin Retained	
								2930	5066	SSC Primary Tooth	
							ENDODONTICS	2920	5056	Re-cement Crown	
0220	5005	Single Film						6930	5160	Re-cement Bridge	
0230	5006	Additional Films (up to T2)		3110	5078	Pulp Capping Direct					
0210	5004	Full Mouth Series		3220	5080	Vital Pulpotomy		2750	5056	Porcelain Baked to Gold	
0240	5007	Intra-oral Occlusal View (maxil. or mandib. ea.)		3120	5079	Pulp Capping Indirect		6751	5154	Porcelain with Metal Abutment	
0272	5010	Bite Wing Films (2)		3310	5083	Single Rooted Tooth		6241	5145	Porcelain with Metal Pontic	
0274	5011	Bite Wm. Films (4)		3320	5084	Bi-rooted Tooth					REMOVABLE PROSTHETICS
0330	5013	Panorex Film (only)		3330	5085	Three Canals					
				3340	5086	Four Canals		5110	5101	Complete Maxillary Denture	
								5120	5102	Complete Mandibular Denture	
							ORAL SURGERY				
							RESTORATIVE DENTISTRY, PRIMARY	5310	5111	Teeth and Clasps	
7110	5164	Uncomplicated									
7120		Each Additional Tooth		2110	5031	One Tooth Surface					Extra / Unit
7210	5169	Surgical Removal - Post OP Visit Complication:		2120	5032	Two Tooth Surfaces		5820	5135	Stayplate-base Free	
7220	5170	Soft Tissue		2130	5034	Three or More Tooth Surfaces		5822		Teeth and Clasp	
7230	5171	Partially Boney								Extra / Unit	
7240	5172	Complete Boney					SPACE MAINTENANCE	5400	5112	Denture Adjustments	
7270	5174	Reimplant/Stabilize Teeth (post accident)						5750	5131	Denture Reline	
				1510	5026	Fixed Space Maintenance		5600	5230	Broken denture Repair	
				10470	5015	Diagnostic Study Models		5640	5122	Replace Missing Teeth	
								5213	5108	Upper Partial Denture	
								5214	5079	Lower Partial Denture	

## New Prescriptions

## Codes

1. Office Visit	12. Crown/Bridge Svc.
2. X-rays	13. Root Canal Treat.
3. Extraction	14. Denture Svc.
4. Prophylaxis	15. Gingival Treat.
5. Sed. Treat.	16. Correct Appl.
6. Consultation	17. Reparative Procedure
7. Diagnosis	18. Fluoride Treat.
8. Silver Restor.	19. Emergency Care
9. Gold Restor.	20. Preventive Counseling
10. Porcelain Restor.	21. Other
11. Oral Surgery	22. Prescription

Revisit / Referral To:

Instructions:

Purpose

Provider Signature

RAE WATERMAN

#100003

JAN 22,2001@10:04

40 y/o female DOB: NOV 10,1960 000 12 0001 TOHONO O'ODHAM NATION OF ARIZONASELLS

Provider: GREG SHORR

Eligibility: DIRECT ONLY

VCN: 100003.160A

# Encounter Form & Health Summary Form

V 1.1

## RSBCIHI Optical Department Encounter Record

Optical 40-004 (Revised 1/00)

### Notes

Problems and POVs	
	POVs.....
250.00	DM
401.9	HTN
879.8	LACERATION
465.9	URI
491.9	COPD
493.90	ASTHMA
995.2	ALLERGY TO DISALCID
354.0	CARPAL TUNNEL SYNDROME
V07.9	IMMUNIZATION
172.7	MELANOMA R GREAT TOE
V58.9	SEEN IN PLASTIC SURGER
V72.0	NO OCULAR PATHOL
692.9	DERMATITIS, DM II, MED
V72.6	PELVIC EXAM
366.16	NUCLEAR SCLEROSIS
079.9	VIRAL SYNDROME RESOLV
466.0	BRONCHITIS.ACUTE
276.8	HYPOKALEMIA

A I | # D | Purpose of Visit

### Diagnoses and ICD Codes

EYELIDS	CORNEA	FUNCTIONAL (cont.)	ANTERIOR CHAMBER	RETINA
373.00 Blepharitis	918.10 Abrasion	378.83 Converg. Insuff.	365.11 Glaucoma, OP	362.13 Arteriosclerosis
303.81 Blepharospasm	371.82 Dystrophy	378.85 Diverg. Excess	365.20 Glaucoma, NA	362.41 Cent Serous Retinopathy
374.84 Cyst	371.24 Edema	378.85 Diverg. Insuff	365.00 Glaucoma, SUS	361.00 Detachment
373.20 Chalazion	930.00 Foreign Body	368.20 Diplopia	364.31 Iritis	362.01 Diabetic Retinopathy
921.40 Contusion	054.40 Herpes	378.41 Esophoria	365.04 Ocular Hypertension	362.57 Drusen
692.90 Dermatitis	371.00 Opacity	378.00 Esotropia		362.84 Ischemia
921.10 Ecchymosis	370.00 Ulcer	378.42 Exophoria		362.81 Hemorrhage
374.10 Ectropion	370.90 Keratitis	378.10 Exotropia	379.31 Aphakia R L	362.10 Hypertensive Retinopathy
373.11 Hordeolum Externum	375.15 Keratitis Sicca	368.30 Fusion Dysfunction	366.90 Cataract	362.50 Macular Degeneration
373.12 Hordeolum Internum	371.60 Keratoconus	378.43 Hyperphoria	366.16 Sclerosis	224.60 Nevus
374.30 Ptosis	370.60 Neurovascular	378.31 Hypertropia		362.60 Retinal Degeneration
374.05 Trichisis	371.13 Pigmentation	379.50 Nystagmus		362.74 Retinal Pigment
078.10 Verruca		378.55 Paresis	379.21 Vitreous Degeneration	363.30 Scar
374.51 Xanthelasma		368.13 Photophobia	397.23 Vitreous Hemorrhage	363.31 Solar Retinitis
	FUNCTIONAL	368.90 Occulomotor Dysfunction		
CONJUNCTIVA / SCLERA	388.00 Amblyopia	368.31 Suppression	REFRACTIVE	GENERAL (by Hx)
372.14 Allergies	379.41 Anisocoria	315.50 Visualization Dysfunction	367.32 Aniseikonia	250.50 Diabetes
379.00 Episcleritis	367.31 Anisometropia	780.70 Visual Fatigue	367.00 Hyperopia	784.00 Headache
930.00 Foreign Body	368.30 Binocular Dysfunction	368.13 Visual Discomfort	367.20 Astigmatism	401.90 Hypertension
372.03 Infections	388.40 Blindness	368.40 Visual Field Defect		315.20 Learning Disability
372.51 Pinguecula	368.8 Blurred Vision	315.90 Visual Motor Dysfunction	367.10 Myopia	346.00 Migraine
372.40 Pterygium	368.59 Color Vision Deficiency		367.40 Presbyopia	240.00 Thyroid
372.72 Subconj. Hemorrhage	378.84 Converg. Excess			

### Treatments and CPT Codes

NEW PATIENT	OTHER SERVICES	CONTACT LENS SERVICES	APHAKIA	SPECIAL CONTACTS
90000 Brief Exam	99050 After Hours Visit	92311 Aphakic Fitting	92353 Bifocal	A4520 Bandage
92004 Comprehensive Exam	90610 Consultation	92335 Cosmetic Fitting	92352 Monofocal	V2512 HGP Bifocal
90010 Limited Exam	92499 Home Visit	92310 Evaluation, Initial	92371 Repair/Refit	V2513 HGP Extended Wear
92002 Intermediate Exam	99070 Materials / Supplies	92324 Evaluation, Refit	92358 Temporary w/Mat	V6457 HGP Replacement
92060 Intermediate Exam (Med)	92498 No-charge Visit	90040 Office Visit, Std.		V2510 HGP Sphere
	99080 Special Report	90050 Office Visit, Comp.		V2511 HGP Toric/Prism
ESTABLISHED PATIENT		92326 Replacement	V2750 Coating A/R	V2522 Hydro Bifocal
90040 Brief Exam	VISION EXAM/THERAPY	92325 Resurfacing	V2760 Coating, Scratch Resist.	V2513 Hydro Extended Wear
92014 Comprehensive Exam	90774 Develop./Percept.	99070 Supplies	V2743 Tint, Glass	Y6458 Hydro Replacement
92012 Intermediate Exam	92060 Strabismus/Amblyopia		V2744 Tint, Photochromic	Y6459 Hydro Replacement, E.W.
90050 Limited Exam	92060 Vision Efficiency Exam	STANDARD LENSES	V2741 Tint, Plastic	V2520 Hydro Sphere
	90050 Vision Therapy Prog.	92342 Bifocal Lenses	V2755 Tint, U/V Protection	V2521 HydroToric/Prism
INDEPENDENT Dx SERVICE	92065 Vision Therapy	V22 Bifocal Lens R		V25 PMMA
92283 Color Vision Ext	99070 Vision Therapy Supplies	V22 Bifocal Lens L		Y6456 PMMA Replacement
92225 Ext. Ophthalmoscopy		92340 Monofocal Lenses	V2799 Misc. Special Lens Svc.	V2599 Non-Classified
92226 Ext. Ophthal..-Subseq	LOW VISION TREATMENT	V21 Monofocal Lens R	V2719 Add Over 3.5 - Bi/Tri	LV ALD
92020 Goniscopy	90099 Compl. Low Vision Eval.	V21 Monofocal Lens L	V2700 Balance Lens	V2610 Single Element
92285 Photography Ext. Ocular	90094 Intermed. Low Vision Eval.	92343 Progressive Lenses	Edge Coat / Polish	V2615 Compound Element
92250 Photography Fundus	92354 Single Element Spect.	V2499 Progressive Lens R	V2718 Fresnel Lens	V2659 Misc.
92100 Serial Tonometry	92355 Comp. Element Spect.	V2499 Progressive Lens L	V2780 Oversize Lenses	V2600 Non Spec H/H
92083 Visual Fields Comp.	92392 Misc Low Vision	92342 Trifocal Lenses	V2715 Prism	FRAMES
92082 Visual Fields Int.		V23 Trifocal Lens R	V2710 Slab Off	V2020 Frame, New
92081 Visual Fields Limited		V23 Trifocal Lens L		V2030 Frame, Repairs/Parts

o VSP Insurance Deductable

o VSP Overage

o Medicare Overage

Disabled Onset \_\_\_\_\_

Revisit / Referral To:

Instructions:

Partially Disabled Est. End \_\_\_\_\_

Purpose:

Never Disabled Actual End \_\_\_\_\_

OK To Work: YES NO

Provider Signature

RAE WATERMAN

#10003

JAN 22,2001@10:04

40 y/o female DOB: NOV 10,1960 000 12 0001 TOHONO O'ODHAM NATION OF ARIZONA

Provider: GREG SHORR

Eligibility: DIRECT ONLY

VCN: 100003.160A

## RSBCIHI Podiatry Encounter Record

Pod 10-029 (Revised 1/00)

## Problems and POVs

«p1c»	«p1»
«p2c»	«p2»
«p3c»	«p3»
«p4c»	«p4»
«p5c»	«p5»
«p6c»	«p6»
«p7c»	«p7»
«p8c»	«p8»
«p9c»	«p9»
«p10c»	«p10»
«p11c»	«p11»
«p12c»	«p12»
«p13c»	«p13»
«p14c»	«p14»
«p15c»	«p15»
«p16c»	«p16»
«p17c»	«p17»
«p18c»	«p18»

## Notes

A | # D |

## Purpose of Visit

## Diagnoses

ICD9	NAILS / SKIN	ICD9	MUSCULO-SKELETAL	ICD9	TRAUMA	ICD9	SYMPTOMATOLOGY
917.2	Blisters	781.2	Abnormal Gait	716.97	Acute Arthritis	719.07	Edema of Ankle
705.89	Bromhydrosis	213.8	Bone Tumor / Exostosis	726.79	Acute Bursitis	729.81	Edema of Leg
682.7	Cellulitis of Foot	726.91	Bone Spur	726.90	Acute Capsulitis	729.81	Edema of Foot/Toes
681.10	Cellulitis of Toe	732.5	Calcaneal Apophysitis	729.1	Acute Myositis	724.3	Sciatica
692.9	Dermatitis	726.73	Calcaneal Heel Spur	730.07	Acute Periostitis		
705.81	Dyshidrosis	718.47	Contracture of MJP	825.25	Fracture of Tarsal / Metatarsal		
110.4	Fungal infection of Skin	736.70	Deformed Metatarsal	826.0	Fracture of Toes	440.9	Arteriosclerosis of Lower Extremity
110.1	Fungal Infection of Nail	735.0	Hallux Valgus	845.10	Ruptured Ligament	715.09	DJD Osteoarthritis
780.8	Hyperhydrosis	735.4	Hammer toe	845.10	Ruptured Tendon	250.	Diabetes
703.8	Hypertrophy of Nail	719.57	Joint Stiffness	727.06	Tenosynovitis	357.2	Diabetic Polyneuropathy
703.0	Onychocryptosis	755.30	Limb Length Discrepancy (congenital)	716.17	Traumatic Osteoarthritis	274.0	Gout
701.1	Keratoma IPK	736.81	Limb Length Discrepancy (acquired)	845.10	Sprained Foot	401.9	Hypertension
681.11	Onychia - Peronychia	726.70	Metatarsalgia	845.00	Sprain/Strain Ankle	355.8	Neuropathy of Lower Extremity
924.3	Subungual hematoma	754.53	Metatars Adductus	892.1	Wound Open Foot	733.7	Osteoporosis
707.1	Ulcer	355.8	Neuralgia / Neuritis	893.1	Wound Open Toes	451.2	Phlebitis
		732.5	Osteochondrosis			443.9	Peripheral Vascular Disease
	SOFT TISSUE	719.4	Pain in Joint			714.0	Rheumatoid Arthritis
727.4	Cyst of Foot	755.67	Painful Ossicle	998.3	Dehiscence of Wound	454.1	Varicose Veins
215.3	Fibroma	734.	Pes Planus	998.1	Hematoma		
917.7	Foreign Body	728.71	Plantar Fascitis	892.1	Peripheral Nerve Entrapment		
355.6	Neuroma	733.99	Sesamoiditis	893.1	Post OP Infection		
239.2	Soft Tissue Tumor	727.81	Short Achilles Tendon	733.82	Pseudoarthrosis		
078.1	Verruca	213.9	Subungual Exostosis	709.2	Scar, Painful		
		727.1	Tailors Bunion	701.4	Scar, Hypertrophic		
		754.62	Talipes Calcaneal Valgus	998.5	Stitch Abscess		

## Treatments

✓ CPT	VISITS	✓ CPT	CASTING	✓ CPT	DESCRIPTION
90010	Office Visit, Initial (Li)		BK Child		Injection of Tendon R / L
90015	Office Visit, Initial (In)		BK Adult		Injection of Small Joint R / L
90040	Office Visit, Established (Br)		BK Walk Child		Injection of Intermediate Joint R / L
90050	Office Visit, Established (Li)		BK Walk Adult		Injection of Nerve R / L
90060	Office Visit, Established (In)		AK Child		Injection, IM
90110	Home Visit, Initial (Li)		Posterior Splint		
90150	Home Visit, Established (Li)		Molded Shoe Cast		
90600	Consultation (Li)		Unna Boot		Misc. / SUPPLIES
			Strapping		Ace Bandage
					Molded Shoes
	BIOMECHANICS				Spenco R / L
95831	Muscle Testing R / L				SURGERY
95851	R.O.M. Study R / L		I&D Abscess		Post Op Shoe R / L
95999	Gait Analysis R / L		Drain Peronychia		Heel Stabilizer R / L
29515	Orthotic Casting R / L		Skin Biopsy		Coban
199070	Orthotic Disp. R / L		Excision of Lesion		Crest - Pad R / L
199070	Accomd. Orthotic R / L		Nail Avulsion, Single		Metatarsal Pad, Removable
	PHYSICAL THERAPY		Partial or Complete Excision of Nail Matrix		Minor Surgery Tray
1 Modality (whirlpool)			Chem/Electro Destruktion		Major Surgery Tray
1 Procedure (Ultrasound)					Triplane Wedge R / L

Revisit / Referral To:

Instructions:

Provider Signature

«patient»

«agesex»

DOB: «dob»

«ssn»

«tribe»

«community»

#«chart»

«timestamp»

«provider»

Eligibility: «elig»

VCN: «uid»

## **Encounter Form & Health Summary Form**

v 1.1

RSBCIHI Behavioral Health Encounter Record

BHS 80-008 (Revised 1/00)

Problems and POVs	
	POVs
250.00	DM
401.9	HTN
879.8	LACERATION
465.9	URI
491.9	COPD
493.90	ASTHMA
995.2	ALLERGY TO DISALCID
354.0	CARPAL TUNNEL SYNDROME
V07.9	IMMUNIZATION
172.7	MELANOMA R GREAT TOE
V58.9	SEEN IN PLASTIC SURGER
V72.0	NO OCULAR PATHOL
692.9	DERMATITIS, DM II, MED
V72.6	PELVIC EXAM
366.16	NUCLEAR SCLEROSIS
079.9	VIRAL SYNDROME RESOLVI
466.0	BRONCHITIS.ACUTE
276.8	HYPOKALEMIA

## Notes

A1 | # D

### Purpose of Visit

## Diagnoses

Diagnoses					ICD-10-CM			
✓ CODE	CHILDHOOD ADOLESCENT DIS.	✓ CODE	COGNITIVE DISORDERS	✓ CODE	SOMATOFORM DISORDERS	✓ CODE	PERSONALITY DISORDERS	
1201	317.00 Mild Mental Retard.	1206	780.09 Delirium, NOS	1146	300.81 Somatization Disorder	1170	Paranoid Personality Disorder	
1202	318.00 Moderate Mental Retard.	1106	294.80 Dementia, NOS	1148	300.11 Conversion Disorder	1171	Schizoid Personality Disorder	
1203	318.10 Severe Mental Retard.	1207	294.80 Cognitive Disorder, NOS		307. Pain Disorder	1172	Schizotypal Personality Dis.	
1117	314.00 Attention Deficit/Hyper.			1220	300.81 Somatoform Disorder	1175	Antisocial Personality Dis.	
1204	314.90 Attn Deficit/Hyper NOS		<b>PSYCHOTIC DISORDERS</b>			1176	Borderline Personality Dis.	
1118	312.80 Conduct Disorder	295.	Schizophrenia		<b>DISSOCIATIVE DISORDERS</b>		1173	Histrionic Personality Dis.
1122	313.81 Oppositional Defiant Dis.	1127	295.40 Schizophreniform Disorder	0596	300.60 Depersonalization Disorder	1174	Narcissistic Personality Dis.	
1205	312.90 Disruptive Behavior Dis., NOS	1126	297.10 Delusional Disorder	1160	300.14 Dissociative Identity Disorder	1177	Avoidant Personality Dis.	
1119	309.21 Separation Anxiety Dis.	1128	298.90 Psychotic Disorder, NOS	1221	300.15 Dissociative Disorder, NOS	1178	Dependent Personality Dis.	
1120	313.90 Disorder of Childhood, NOS	1128	298.90 Psychotic Disorder, NOS			1179	Obsessive-Compulsive Dis.	
					<b>IMPULSE CONTROL DISORDERS</b>		1181	Personality Disorder, NOS
			<b>MOOD DISORDERS</b>		1152	312.34 Intermittent Explosive Disorder		
	<b>SUBSTANCE RELATED DIS.</b>		296. Major Depressive Disorder	1156	312.32 Kleptomania		<b>EATING DISORDERS</b>	
0438	303.90 Alcohol Dependence	1149	300.40 Dysthymic Disorder	1157	312.33 Pyromania	1150	Anorexia Nervosa	
1107	305.00 Alcohol Abuse	0478	311.00 Depressive Disorder, NOS	1158	312.31 Pathological Gambling	1151	Bulimia Nervosa	
1112	304.40 Amphetamine Dependence		296. Bipolar I Disorder	1222	312.39 Trichotillomania	1154	Eating Disorder, NOS	
1111	305.70 Amphetamine Abuse	1215	296.89 Bipolar II Disorder	1223	312.30 Impulse Control Disorder, NOS			
1208	304.30 Cannabis Dependence	1216	310.13 Cyclothymic Disorder				<b>ADJUSTMENT DISORDERS</b>	
1114	305.2 Cannabis Abuse	1217	296.80 Bipolar Disorder, NOS		<b>OTHER CONDITIONS</b>		1162	Adj. Dis. w/ Depressed Mood
1209	304.20 Cocaine Dependence	1218	293.83 Mood Disorder due to....	1224	333.90 Med Induced Mvt Dis., NOS	1163	Adj. Dis. w/ Anxiety	
1110	305.60 Cocaine Abuse	1219	296.90 Mood Disorder, NOS	0443	995.20 Adverse Effects of Med, NOS	1164	Adj. Dis. w/ Mixed Emotions	
1210	304.50 Hallucinogenic Dependence				1192	V61.20 Parent-Child Relational Prob.	1165	Adj. Dis. w/ Conduct Disturbance
1115	305.30 Hallucinogenic Abuse		<b>ANXIETY DISORDERS</b>		1191	V61.10A Partner Relational Problem	1166	Adj. Dis. w/ Emotions & Conduct
1211	304.60 Inhalant Dependence	1141	300.01 Panic Dis. w/o Agoraphobia	1183	V62.81 Relational Problem, NOS	1169	Adj. Dis., NOS	
1113	305.90 Inhalant Abuse	1137	300.21 Panic Dis. w/ Agoraphobia	1195	V62.21 Abuse/Neglect of Child			
0603	305.10 Nicotine Dependence	1138	300.22 Agoraphobia w/o Panic	1197	V61.21 Sexual Abuse of Adult			
1212	304.00 Opioid Dependence	1140	300.29 Specific Phobia	1191	V61.10B Non-compliance with Plan			
1213	305.50 Opioid Abuse	1139	300.23 Social Phobia	1182	V61.10C Adult Antisocial Behavior			
0434	304.90 Phenacyclidine Dependence	1143	300.30 OCD	1184	V15.81 Child/Adol. Antisocial Behavior			
1113	305.90 Phenacyclidine Abuse	1145	309.81 Post-Traumatic Stress Dis.	1185	V62.82 Bereavement			
1109	304.10 Sed/Hypno/Anxio Dependence	1144	308.30 Acute Stress Disorder	1188	V62.30 Academic Problem			
1108	305.40 Sed/Hypno/Anxio Abuse	1142	300.02 Generalized Anxiety Disorder	1187	V62.20 Occupational Problem			
1106	304.80 Poly-substance Dependence	0591	296.90 Anxiety Disorder, NOS	1190	V62.89A Religious/Spiritual Problem			
0430	304.90 Other Substance Dependence			1190	V62.89B Phase of Life Problem			
1113	305.90 Other Substance Abuse		<b>PRIMARY SLEEP DISORDER</b>		1189	V71.09 No Axis I Dx or Axis II Dx		
1214	292.90 Other Subst.-Rel. Dis., NOS	0797	307.47A Dyssomnia, NOS					
		1159	307.47B Parasomnia, NOS					

## Treatments

CPT	MOD	DESCRIPTION	CPT	MOD	DESCRIPTION	CPT	MOD	DESCRIPTION
90806		Psychotherapy 60 Min.	90846		Family Therapy w/o Patient 60 Min.	99241		Office Consultation 15 Min.
90806		Crisis Visit 60 Min.	90846	22	Family Therapy w/o Patient 90 Min.	99242		Office Consultation 30 Min.
90804		Psychotherapy 30 Min.	90847		Family Therapy 60 Min.	99244		Office Consultation 60 Min.
90804		Crisis Visit 30 Min.	90847	22	Family Therapy 90 Min.	9923.		Hospital Visit
90808		Crisis Visit 90 Min.	90880	22	Hypnotherapy 90 Min.	96100		Psychological Testing
99350		Psychotherapy/Home 60 Min.	90880		Hypnotherapy 60 Min.	90882		Environmental Intervention
99348		Psychotherapy/Home 90 Min.	90880	52	Hypnotherapy 30 Min.	90801		Psych Diag/Eval Interview
90853	22	Group Therapy 60 Min.	99371		Crisis Phone Consult 15 Min.	90885		Psych Review of Reports and Test Results
90853	22	Group Therapy 30 Min.	99372		Crisis Phone Consult 30 Min.	90862		Pharmacologic Management
90853		Group Therapy 2 Hrs.	99373		Crisis Phone Consult 60 Min.	90887		Interpretation of Exam Results
90849		Multi-Family Group therapy	90899	A	CD Counseling 30 Min.	90889		Report Preparation
90812		Interactive Play Therapy	90899	B	CD Counseling 60 Min.			
90847		Conjoint Marital Therapy	90899	C	CD Group Counseling 90 Min.			

**Revisit / Referral To:**

### Instructions:

**Provider Signature**

---

BAE WATERMAN

40 y/o female DOB: NOV 10 1960 000 12 0001 TOHONO O'ODHAM NATION OF ARIZONA SELLIS

R&E W  
#100003

JAN 22 2001 @10:04

Provider: CREC SHORR

**Eligibility: DIRECT ONLY**

VCN: 100003.160A